

Public Document Pack



COTSWOLD
District Council

Wednesday, 8 April 2026

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CABINET

A meeting of the Cabinet will be held in the Council Chamber - Council Offices, Trinity Road, Cirencester, GL7 1PX on **Thursday, 16 April 2026 at 6.00 pm.**

A handwritten signature in black ink that reads 'Jane Portman'.

Jane Portman
Chief Executive

To: Members of the Cabinet
(Councillors Mike Every, Juliet Layton, Patrick Coleman, Tony Dale, Mike McKeown, Andrea Pellegram and Tristan Wilkinson)

Recording of Proceedings – The law allows the public proceedings of Council, Cabinet, and Committee Meetings to be recorded, which includes filming as well as audio-recording. Photography is also permitted.

As a matter of courtesy, if you intend to record any part of the proceedings please let the Committee Administrator know prior to the date of the meeting.

Cotswold District Council, Trinity Road, Cirencester, Gloucestershire, GL7 1PX
Tel: 01285 623000 www.cotswold.gov.uk

AGENDA

1. **Apologies**
To receive any apologies for absence. The quorum for Cabinet is 3 members.
2. **Declarations of Interest**
To receive any declarations of interest from Members and Officers, relating to items to be considered at the meeting.
3. **Minutes** (Pages 9 - 20)
To approve the minutes of the previous meeting held on 5 March 2026..
4. **Leader's Announcements**
To receive any announcements from the Leader of the Council.
5. **Public Questions**
To deal with questions from the public within the open forum question and answer session of fifteen minutes in total. Questions from each member of the public should be no longer than one minute each and relate to issues under the Cabinet's remit. At any one meeting no person may submit more than two questions and no more than two such questions may be asked on behalf of one organisation.

The Leader will ask whether any members of the public present at the meeting wish to ask a question and will decide on the order of questioners.

The response may take the form of:

- a) a direct oral answer;
- b) where the desired information is in a publication of the Council or other published work, a reference to that publication; or
- c) where the reply cannot conveniently be given orally, a written answer circulated later to the questioner.

6. **Member Questions**
No Member Questions have been submitted prior to the publication of the agenda.

A Member of the Council may ask the Leader or a Cabinet Member a question on any matter in relation to which the Council has powers or duties or which affects the Cotswold District. A maximum period of fifteen minutes shall be allowed at any such meeting for Member questions.

A Member may only ask a question if:

- a) the question has been delivered in writing or by electronic mail to the Chief Executive no later than 5.00 p.m. on the working day before the day of the meeting; or
- b) the question relates to an urgent matter, they have the consent of the Leader to whom the question is to be put and the content of the question is given to the Chief Executive by 9.30 a.m. on the day of the meeting.

An answer may take the form of:

- a) a direct oral answer;
- b) where the desired information is in a publication of the Council or other published work, a reference to that publication; or
- c) where the reply cannot conveniently be given orally, a written answer circulated later to the questioner.

7. **Schedule of Decisions taken by the Leader of the Council and/or Individual Cabinet Members** (Pages 21 - 24)

To note the decisions taken by the Leader and/or Individual Cabinet Members since the agenda for Cabinet 5 March 2026 was published. The following non-key decisions have been taken by individual Cabinet Members under delegated authority:

1. Cabinet Member for Housing and Planning – Decision meeting 31 March 2026.
The purpose of the meeting was to consider five neighbourhood plans at various stages.

Closing Date for Call-In: 10 April 2026

Date decisions effective: 11 April 2026.

8. **Issue(s) Arising from Overview and Scrutiny and/or Audit and Governance**

To receive any recommendations from the Overview and Scrutiny Committee and to consider any matters raised by the Audit and Governance Committee.

9. **Service Performance Report 2025-26 Quarter 3** (Pages 25 - 88)

Purpose

To provide an update on progress on the Council's priorities and service performance for Q3 2025 -26.

Recommendation

That Cabinet resolves to:

1. Note overall progress on the Council priorities and service performance for 2025-26 Q3 (October-December 2025).

10. **Financial Performance Report 2025-26 Quarter 3** (Pages 89 - 122)

Purpose

This report sets out the third quarterly budget monitoring position for the 2025/26 financial year.

Recommendation

That Cabinet resolves to:

1. Review and note the financial position set out in this report.

11. **Strategic Risk Register Q3 2025-26** (Pages 123 - 134)

Purpose

The report sets out the current Strategic Risk Register for the Council.

Recommendations

That Cabinet resolves to :

1. Review and note the Strategic Risk Register and mitigation measures.

12. **Discretionary Rate Relief policy** (Pages 135 - 160)

Purpose

To consider and approve amendments to the Discretionary Rate Relief Policy.

Recommendations

That Cabinet resolves to:

1. Approve the amendments to the Discretionary Rate Relief Policy as detailed within the report;
2. Delegate to the Chief Finance Officer, in consultation with the Cabinet Member for Finance, any future amendments to the Policy in respect of Electric Vehicle Charging Points and Electric Vehicle Forecourts.

13. **Publica Business Plan 2026-28** (Pages 161 - 180)

Purpose

To consider the Draft Publica Business Plan 2026-28, produced by the Publica Board in consultation with Directors and Shareholders, and to recommend that the Leader (as Shareholder Representative) approves the plan.

Recommendations

That Cabinet resolves to:

1. Endorse the Publica Business Plan 2026-2028
2. Ask the Leader, as shareholder representative, to recommend its adoption to the Board.

14. **Review of Publica Governance Agreement and Extension of Service Agreement** (Pages 181 - 188)

Purpose

The purpose of this report is for the Cabinet to consider proposals for amendments and an extension to governance arrangements following the conclusion of the Publica Review. This includes the updating of service specifications, service agreements, the members agreement and articles of association.

The report also seeks delegated authority to make any minor adjustments to the Publica specification in the run-up to Local Government Reorganisation should it become necessary.

Recommendations

That Cabinet resolves to:

1. Approve in principle the changes to the governance agreements set out in section 3.
2. Delegate authority to the Chief Executive, in consultation with the Leader, to finalise and enact through appropriate legal documentation, the detailed changes to the agreements, in line with the principles agreed.
3. Delegate authority to the Chief Executive, in consultation with the Leader, to approve minor amendments to the scope of services delivered by Publica to Cotswold District Council in advance of Local Government Reorganisation.

15. **Retention Strategy 2026-28** (Pages 189 - 210)

Purpose

This report presents the Council's Retention Strategy for approval.

Recommendation

That Cabinet resolves to:

1. Approve the Retention Strategy.

16. **Advertising, Sponsorship & Endorsement Policy** (Pages 211 - 220)

Purpose

This report presents the Council's Advertising, Sponsorship and Endorsement Policy for approval.

Recommendation

That Cabinet resolves to:

1. Approve the Advertising, Sponsorship & Endorsement Policy.

17. **Artificial Intelligence Adoption Strategy** (Pages 221 - 242)

Purpose

The purpose of the report is to consider a strategy for the adoption of Artificial Intelligence (AI) across council services that protects residents and service users whilst enabling them to access the benefits that AI can offer. The report also recommends the adoption of a policy to guide use of AI for employees and councillors.

Recommendations

That Cabinet resolves to:

1. Approve the AI Usage Policy at Annex A
2. Approve the AI Adoption Strategy and Roadmap at Annex B.

18. **Creation of a Commercial Development Post** (Pages 243 - 250)

Purpose

To seek Cabinet's approval of the creation of a part-time, fixed term post to drive commerciality across the culture sector in Cirencester and the wider district.

Recommendations

That Cabinet resolves to:

1. Approve the creation of a fixed term contract post to work with visitor attractions to drive up income and reduce costs.
2. Endorse the principle of targets for growth over the two years and grants delegated authority to the Director of Communities and Place in consultation with the Cabinet Members for Health, Culture and Visitor Experience to set out the detailed proposals for how this is calculated and reported.

19. **UBICO Business Plan 2026-27** (Pages 251 - 278)

Purpose

To consider the draft Ubico Business Plan 2026-27, produced by Ubico in consultation with its directors and shareholders, and to endorse that the Leader (as Shareholder Representative) approves the plan.

Recommendations

That Cabinet resolves to:

1. Note the draft Ubico Business Plan 2026-27; and
2. Endorse that the Leader of the Council, as shareholder representative, will sign the written resolution to approve the draft Ubico Business Plan 2026-27.

20. **Next Meeting**

To confirm the date of the next meeting of Cabinet.

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Cabinet
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Minutes of a meeting of Cabinet held on Thursday, 5 March 2026

Members present:

Mike Evely	Juliet Layton
Patrick Coleman	Mike McKeown
Tony Dale	Tristan Wilkinson

Officers present:

Andrew Brown, Head of Democratic and Electoral Services	Jane Portman, Chief Executive Officer
Angela Claridge, Director of Governance and Development (Monitoring Officer)	David Stanley, Deputy Chief Executive and Chief Finance Officer
Julia Gibson, Democratic Services Officer	Frank Wilson, Managing Director (Public)
Tyler Jardine, Trainee Democratic Services Officer	Danielle Berry, Natural, Built and Historic Environment Manager
Claire Locke, Executive Director Corporate Services	Caroline Clissold, Business Manager for Housing and Resident Services
Nickie Mackenzie-Daste, Senior Democratic Services Officer	Maria Wheatley, Shared Parking Manager
Helen Martin, Director of Communities and Place	Thomas See, Homeseeker Plus Lead

204 Apologies

Apologies were received from Councillor Andrea Pellegram.

205 Declarations of Interest

There were no declarations of interest from Members.

206 Minutes

The purpose of this item was to consider the minutes of Cabinet held on 5 February 2026.

The recommendation to approve the minutes was proposed by Councillor Mike Evey and seconded by Councillor Tony Dale.

RESOLVED that the minutes of the meeting of the Cabinet held on 5 February 2026 be approved as a correct record.

Voting record:
6 For, 0 Against, 0 Abstentions.

To approve the minutes of Cabinet held on 5 February 2026. (Resolution)		
Cabinet RESOLVED that the minutes of the meeting of the Cabinet held on 5 February 2026 be approved as a correct record.		
For	Patrick Coleman, Tony Dale, Mike Evey, Juliet Layton, Mike McKeown and Tristan Wilkinson	6
Against	None	0
Conflict Of Interests	None	0
Abstain	None	0
Carried		

207 Leader's Announcements

There were no announcements from the Leader.

208 Public Questions

There were no public questions.

209 Member Questions

There were no Member questions.

210 Schedule of Decisions taken by the Leader of the Council and/or Individual Cabinet Members

No delegated decisions had been taken by the Leader and/or Individual Cabinet Members since the publication of the agenda for Cabinet 5 March 2026.

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211 Issue(s) Arising from Overview and Scrutiny and/or Audit and Governance

Cabinet noted that the Overview and Scrutiny Committee had met earlier in the week to consider matters relating to Local Government Reorganisation (LGR) in the Cotswold District, and that the Committee had made no specific recommendations for Cabinet's consideration.

212 Biodiversity Action Plan

The purpose of this report was to approve the biodiversity duty report for publication. It was noted that the publication of this report was a legal requirement for all local authorities and had to be completed no later than 26 March 2026.

Councillor Juliet Layton, Deputy Leader and Cabinet Member for Housing and Planning introduced the report and explained that the Environment Act 2021 had strengthened the legal duty on public authorities to conserve and enhance biodiversity, and required local planning authorities to publish a report demonstrating how that duty was being met, including performance in delivering Biodiversity Net Gain, which had become mandatory for most developments since February 2024.

The report outlined how biodiversity considerations were being incorporated across a range of Council services, including planning, green space management, climate and sustainability programmes, and partnership working with organisations such as Gloucestershire Wildlife Trust and the Local Nature Partnership. The Council's performance in delivering Biodiversity Net Gain (BNG) was also highlighted. It was noted that between February 2024 and December 2025 the Council had discharged 24 BNG plans, the highest number among authorities in Gloucestershire.

The report identified opportunities to further strengthen the Council's approach over the next five years, including the development of a Biodiversity Action Strategy. This strategy would be informed by the Gloucestershire Local Nature Recovery Strategy and the forthcoming review of the Council's Ecological Emergency Action Plan, and would seek to embed biodiversity considerations more fully within corporate decision-making, monitoring, and reporting.

Cabinet was asked to approve the Biodiversity Duty Report for publication, endorse the development of the Biodiversity Action Strategy, and delegate authority to the Assistant Director for Planning Services, in consultation with the Cabinet Member, to make minor editorial and presentation changes prior to publication.

The Leader commented that the report also highlighted two S106 agreements with significant BNG on site and invited any questions or comments.

The Cabinet Member for Finance noted that the Biodiversity Net Gain (BNG) grant had been incorporated into the Revenue Support Grant as part of the Local Government

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Finance Settlement for the upcoming financial year. As a result, there would no longer be a separate, ring-fenced allocation for BNG funding from central government, and local authorities would therefore determine their own level of expenditure on BNG from the overall Revenue Support Grant.

The Deputy Chief Executive, David Stanley confirmed that the Council currently held £45,000 of previously unspent BNG funding in reserve, which could be drawn down to support related activity. Should additional funding be required beyond this reserve, officers would need to seek Cabinet approval for further budget allocation.

Councillor Tristan Wilkinson spoke to second the report and thanked Councillor Layton for her summary of the report.

The recommendations were proposed by Councillor Juliet Layton and seconded by Councillor Tristan Wilkinson.

The proposal was put to the vote and agreed by Cabinet.

Voting record:

6 For, 0 Against, 0 Abstentions.

To approve the recommendations of the Biodiversity Duty report. (Resolution)		
RESOLVED that Cabinet: <ol style="list-style-type: none">1. Approved the biodiversity duty report within Annex A for publication.2. Delegated to the Assistant Director – Planning Services in consultation with the Cabinet Member for Housing and Planning to make presentational and minor editorial changes for publication.		
For	Patrick Coleman, Tony Dale, Mike Evemy, Juliet Layton, Mike McKeown and Tristan Wilkinson	6
Against	None	0
Conflict Of Interests	None	0
Abstain	None	0
Carried		

213 Gloucestershire Local Nature Recovery Strategy

The purpose of the report was to endorse the Gloucestershire Local Nature Recovery Strategy.

The report was introduced by Councillor Juliet Layton, Deputy Leader and Cabinet Member for Housing and Planning.

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Councillor Layton noted that the Environment Act 2021 had introduced a statutory requirement for a Local Nature Recovery Strategy (LNRS) covering every area of England. The LNRS for Gloucestershire had been approved by Gloucestershire County Council, which had been appointed by Department for Environment, Food & Rural Affairs (DEFRA) as the responsible authority. The strategy had been developed collaboratively with district, borough and city councils and key partners including the Gloucestershire Local Nature Partnership.

Councillor Layton explained that the LNRS functioned as a spatial planning tool identifying landscape-scale opportunities for nature recovery, including areas where habitat creation, restoration or expansion would have the greatest impact. It was emphasised that the strategy was not prescriptive but provided guidance to public bodies, landowners, farmers and voluntary or private organisations to help target action where biodiversity benefits would be greatest. The strategy also identified areas of particular importance for biodiversity, where nature recovery measures should be prioritised, and where landowners undertaking habitat creation or restoration might be eligible for grant funding or enhanced payments through national schemes.

Councillor Layton explained that local planning authorities were required under the strengthened biodiversity duty to conserve and enhance biodiversity and to have regard to the relevant LNRS in carrying out their functions. The strategy would therefore become an important reference point for planning decisions, policy development and wider corporate activity.

It was further noted that Cotswold District Council had already begun implementing the approach, and had, working with the National Trust established a habitat bank at the Sherborne Estate aligned with the emerging LNRS measures. This work was intended to support high-quality biodiversity net gain delivery and demonstrated the Council's commitment to partnership-led nature recovery.

Cabinet noted that the LNRS had been approved by the County Council's Cabinet in January 2026 and that endorsing the strategy would ensure that the Council was aligned with the county-wide approach and able to integrate the strategy into its planning, land management and biodiversity work. Members were recommended to read the full document which was publicly available online.

The Leader thanked Councillor Juliet Layton for presenting the report and noted that the Local Nature Recovery Strategy was a comprehensive document, including detail on specific species and wider habitat measures. It was noted that the strategy would assist the Council and partner authorities across Gloucestershire in identifying opportunities to enhance nature recovery.

Councillor Mike McKeown, in seconding the recommendation, welcomed the strategy as an important framework for restoring habitats and improving biodiversity across the district and county. He highlighted the role of healthy ecosystems in supporting

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climate resilience, including carbon storage and flood management, and referred to recent flooding during Storm Bert as an example of the impacts of poor land absorption. He added that the strategy was particularly significant for the Cotswolds, where the natural landscape was a key asset.

The recommendation was proposed by Councillor Juliet Layton and seconded by Councillor Mike McKeown

The proposal was put to the vote and agreed by Cabinet.

Voting record:

6 For, 0 Against, 0 Abstentions.

To endorse the Gloucestershire Local Nature Recovery Strategy (Resolution)		
RESOLVED that Cabinet: 1. Endorsed the Gloucestershire Local Nature Recovery Strategy.		
For	Patrick Coleman, Tony Dale, Mike Evemy, Juliet Layton, Mike McKeown and Tristan Wilkinson	6
Against	None	0
Conflict Of Interests	None	0
Abstain	None	0
Carried		

214 Infrastructure Funding - Community Infrastructure Levy (CIL) Project

The purpose of the report was to seek delegated authority for the Assistant Director of Planning, in consultation with the Cabinet Member for Planning and Housing, to implement enhancements to the Council's Community Infrastructure Levy (CIL) funding bid process.

The report was introduced by Councillor Juliet Layton, Deputy Leader and Cabinet Member for Housing and Planning, who explained that the Community Infrastructure Levy (CIL), adopted in 2019, was collected from most developments to fund strategic infrastructure to support local communities. Members were advised that 5% of receipts were used for administration, while 15% was allocated to town and parish councils without a neighbourhood plan and 25% to those with a neighbourhood development plan, with a five-year spending period for those allocations.

It was reported that the Council had operated CIL since 2019 and had completed two strategic funding rounds. A review of the process, informed by experience and stakeholder feedback, had identified opportunities to improve transparency, strategic alignment and collaboration in the allocation of funds.

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The proposed changes related to the allocation process rather than the charging schedule. The current single annual bidding window would be replaced with a year-round application process, with bids assessed by officers between October and December. The revised approach would strengthen alignment with the Council's Corporate Plan and Infrastructure Delivery Plan, improve engagement with parishes, community groups and infrastructure partners, and introduce clearer strategic criteria for assessing bids. Monitoring and reporting would also be enhanced to better demonstrate the impact of funded projects.

Members were advised that the report sought delegated authority for the Assistant Director for Planning Services, in consultation with the Cabinet Member, to implement the proposed improvements in time for the next funding round.

Members discussed the proposed enhancements to the Community Infrastructure Levy (CIL) allocation process. Councillor Mike Evemy noted that the programme aimed to improve the process based on experience from previous funding cycles and ensure alignment with the Council's corporate priorities, while maintaining the distinction between CIL-funded projects and infrastructure delivered through other mechanisms such as Section 106 agreements.

The updated governance arrangements were welcomed, in particular the emphasis on community engagement. The importance of involving members and parish councils as consultees during bid assessment to ensure local input and support was noted. The Kemble to Cirencester cycle path, funded through CIL, was cited as an example of successful collaboration with strong local buy-in, contributing to sustainable transport and community benefits.

It was noted that, historically, CIL or equivalent funds had been used for village halls, but current community needs were broader, including health, wellbeing, and mental health provision, particularly for younger residents. It was emphasised that the revised governance should ensure CIL funding targeted infrastructure that delivered tangible benefits for communities.

The Director of Communities and Place, noted that consideration had been given to balancing allocations between strategic climate emergency and sustainable, healthy community projects, with the current approach focusing on weighting the scoring matrix to achieve the appropriate mix of infrastructure.

The recommendation was proposed by Councillor Juliet Layton and seconded by Councillor Patrick Coleman.

The proposal was put to the vote and agreed by Cabinet.

Voting record:

6 For, 0 Against, 0 Abstentions.

To delegate authority for the implementation of the CIL Enhancement Programme (Resolution)		
RESOLVED that Cabinet:		
<ol style="list-style-type: none"> 1. Delegated authority to the Assistant Director, Planning Service in consultation with the Cabinet Member for Planning and Housing to implement a CIL Enhancement Programme detailed at Section 3 of this report. 		
For	Patrick Coleman, Tony Dale, Mike Evey, Juliet Layton, Mike McKeown and Tristan Wilkinson	6
Against	None	0
Conflict Of Interests	None	0
Abstain	None	0
Carried		

215 HomeSeekerPlus Policy Review

The purpose of the report was to present to Cabinet an updated HomeseekerPlus Policy to replace the existing policy, which had been in place since 2016 and was last reviewed in 2022.

Councillor Juliet Layton, Deputy Leader and Cabinet Member for Housing and Planning, explained that the policy had required updating in light of significant legislative changes, updated national guidance, and operational learning across the partnership. Members were advised that the proposed revisions aimed to ensure the policy remained fair, transparent, legally compliant, and aligned with statutory guidance on choice-based letting for social housing.

The review addressed new statutory duties, including those relating to domestic abuse and the armed forces, and updated case law affecting eligibility, priority need, and local connection. Officers had also proposed clearer definitions and strengthened operational processes regarding medical and welfare needs, overcrowding, under-occupation, and threatened homelessness, as well as improved verification, reassessment, and suspension procedures to maintain an accurate register.

The updated policy incorporated best practice from across the sector, strengthened safeguarding and support for vulnerable households, and was expected to remain in place until after local government reorganisation, providing stability during structural change. Members were advised that questions on the detailed policy should be directed to council officers due to the sensitive and nuanced nature of the policy.

The Leader invited questions from Cabinet Members.

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Councillor Patrick Coleman queried the emergency banding for downsizing within the HomeSeeker Plus policy, seeking clarification on whether it applied to the whole of Gloucestershire or only Gloucester City. Councillor Juliet Layton confirmed that the scheme operated across Gloucestershire and West Oxfordshire, in partnership with seven local authorities and social housing landlords, enabling tenants to bid for properties through a choice-based lettings system.

Councillor Mike Evely seconded the recommendation, noting minor wording amendments to clarify that the policy would be adopted following consideration of consultation responses. He thanked housing officers, for their work supporting residents to access and maintain housing and prevent homelessness. Members were advised that the consultation would commence in May, with the revised policy subsequently adopted following consideration of responses from the partnership authorities.

Cabinet noted that the HomeSeeker Plus policy would continue to operate across all districts and boroughs in Gloucestershire and West Oxfordshire, providing a consistent framework through local government reorganisation.

The recommendations were proposed by Councillor Layton and seconded by Councillor Mike Evely.

The proposal was put to the vote and agreed by Cabinet.

Voting record:

6 For, 0 Against, 0 Abstentions.

To approve the recommendations for the Homeseeker Plus Policy Review (Resolution)		
RESOLVED that Cabinet: <ol style="list-style-type: none">1. Approved the draft Policy amendments for public consultation.2. Delegated authority to the Business Manager for Housing, in consultation with the Deputy Leader and Cabinet Member for Housing and Planning and the Public Executive Director – Operations, to adopt the new policy following consideration of the consultation responses.		
For	Patrick Coleman, Tony Dale, Mike Evely, Juliet Layton, Mike McKeown and Tristan Wilkinson	6
Against	None	0
Conflict Of Interests	None	0
Abstain	None	0
Carried		

216 Delegated Approval to Award Contract (Parking)

The purpose of the report was to seek approval of delegated authority to award the contract for pay and display machines for car parks.

The report was introduced by Councillor Tony Dale, Cabinet Member for Health, Culture and Visitor Experience who explained that the existing machines were increasingly outdated, required frequent maintenance, and were difficult to use, necessitating a full refresh of the parking estate.

The proposed procurement set out the types, locations, and operational requirements of new machines, including installation, commissioning, servicing, and removal of old machines. The process included a four-week tender period, with evaluations conducted by a dedicated parking and procurement team.

It was noted that authority would be delegated to the Section 151 Officer, in consultation with the Cabinet Member for Health, Culture and Visitor Experience, to award the contract for the supply, installation, and ongoing operation of the new parking machines to the most advantageous supplier.

Members were informed that the new machines were expected to provide faster, easier, and more reliable payment options for residents and visitors, enhancing the overall parking experience across the District. Councillor Dale noted that procurement had been accelerated to enable the timely replacement and operation of machines within the current budget year.

The Leader invited questions from Cabinet Members.

Councillor Juliet Layton welcomed the proposals for new parking machines, noting the importance of speed, clarity, and accessibility, including for users with disabilities. Councillor Tony Dale acknowledged that while no solution would have all desired features, simplicity, clarity, and speed were paramount, and emphasised that the new machines should be future-proofed to enable mobile payments and efficient maintenance. He expressed confidence in the parking and procurement teams to deliver a fit-for-purpose solution and confirmed that any compromises would be reported back to Cabinet.

Councillor Tristan Wilkinson supported the approach, praising its user-centric design and clarity of requirements, noting that this methodology could serve as a model for other Council procurements. Officers confirmed that customer feedback had informed the specification and that the evaluation team would ensure all criteria were considered.

In summing up Councillor Tony Dale welcomed the decision, noting it was timely, well-considered, and supported the early delivery of the service. Councillor Dale confirmed that he would monitor progress to ensure there were no delays.

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The recommendation was proposed by Councillor Tony Dale and seconded by Councillor Mike Evey.

The proposal was put to the vote and agreed by Cabinet.

Voting record:

6 For, 0 Against, 0 Abstentions.

To approve delegated authority for the supply, installation and on-going services to the Districts car-parking machines (Resolution)

RESOLVED that Cabinet:

1. Delegated authority to the Section 151 Officer, in consultation with the Leader of the Council and the Cabinet Member for Health, Culture and Visitor Experience to award the contract for the supply, installation and on-going services to the most advantageous supplier.

For	Patrick Coleman, Tony Dale, Mike Evey, Juliet Layton, Mike McKeown and Tristan Wilkinson	6
Against	None	0
Conflict Of Interests	None	0
Abstain	None	0
Carried		

217 Next Meeting

The next meeting date of Cabinet was confirmed as 16 April 2026 at 6.00 pm.

The Meeting commenced at 6.00 pm closed at 6.50 pm.

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Cabinet – 16 April 2026

SCHEDULE OF DECISION(S) TAKEN BY THE LEADER OF THE COUNCIL AND/OR INDIVIDUAL CABINET MEMBERS

Note:

- Any decision that is still subject to call-in by the Overview and Scrutiny Committee is marked with the expiry date of call-in at the standard close of business time of 5pm.
- Further information on the decision taken and the webcast link can be found within the hyperlink for each 'subject'.
- Decisions below are those taken after the publication of the Cabinet agenda on 5 March 2026.

Cabinet Member/ Officer	Meeting date	Subject	Decision(s)
Cabinet Member for Housing and Planning	31/03/2026	The consideration of five neighbourhood plans at various stages.	<p>The Cabinet Member for Housing and Planning considered the recommendations within the report and noted to approve the recommendations regarding the neighbourhood plans.</p> <p>The Cabinet Member for Housing and Planning confirmed the following decisions:</p> <p><u>Mickleton Neighbourhood Plan:</u></p> <p>Councillor Layton noted that this represented the beginning of the Parish Council's Neighbourhood Plan process and welcomed the early engagement.</p>



			<p>The officer's recommendation to designate Mickleton as a Neighbourhood Area and Mickleton Parish Council as the qualifying body was accepted by Councillor Layton and she wished the Parish Council well in progressing the Neighbourhood Plan. Recommendation APPROVED.</p> <p><u>Siddington Neighbourhood Plan:</u> No formal decision was required at this stage. The update was NOTED.</p> <p><u>Moreton-in-Marsh Neighbourhood Plan:</u> Councillor Layton welcomed the progress made and accepted the officers recommendation for the commencement of the Regulation 16 consultation on 16 April 2026, emphasising the importance of promoting the consultation widely to encourage public engagement. Recommendation APPROVED.</p> <p><u>Cirencester Neighbourhood Plan:</u> Councillor Layton welcomed the thorough review undertaken, accepted the officer's recommendation to commence the Regulation 16 consultation, and expressed her support for wide public engagement in the process. Recommendation APPROVED.</p>
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			<p><u>Chipping Camden Neighbourhood Plan:</u> No formal decision was required at this stage. The update was NOTED.</p> <p><u>Cotswold District Council - Decision - Decision</u></p> <p><u>Decision effective from 11/04/2026.</u></p>
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Agenda Item 9



COTSWOLD
District Council

Council name	COTSWOLD DISTRICT COUNCIL
Name and date of Committee	CABINET – 16 APRIL 2026
Subject	COUNCIL PRIORITY AND SERVICE PERFORMANCE REPORT – 2025-26 QUARTER THREE (OCTOBER-DECEMBER 2025)
Wards affected	All
Accountable member	Councillor Mike Every, Leader of the Council Email: mike.every@cotswold.gov.uk
Accountable officer	Jane Portman, Chief Executive Email: jane.portman@cotswold.gov.uk
Report author	Alison Borrett, Senior Performance Analyst Email: alison.borrett@cotswold.gov.uk
Summary/Purpose	To provide an update on progress on the Council's priorities and service performance
Annexes	Annex A - Corporate Plan Action Tracker Annex B - Council Priorities Report Annex C - Performance Indicator Report
Recommendation(s)	That Cabinet resolves to: 1. Note overall progress on the Council priorities and service performance for 2025-26 Q3 (October-December 2025).
Corporate priorities	<ul style="list-style-type: none"> • Preparing for the Future • Delivering Good Services • Responding to the Climate Emergency • Delivering Housing • Supporting Communities • Supporting the Economy
Key Decision	NO
Exempt	NO
Consultees/ Consultation	CDC Corporate Leadership Team, Publica Directors, Business Managers, Service Managers and Service Leads.



1. BACKGROUND

- 1.1** High-performing front-line public services are critical to the Council's role in supporting residents, businesses and communities. By ensuring our performance framework highlights variations from expected performance at the earliest opportunity, we can trigger targeted interventions that support improvement and recovery. This, in turn, strengthens our ability to provide modern, effective services for residents, businesses and communities.

Our performance framework covers the full range of public services delivered to communities through a variety of delivery models including the Council itself and the Council's Teckal companies (Publica and Ubico). The report aims to provide the necessary information for the Council to assess whether services are being delivered in line with agreed quality standards and expectations.

- 1.2** The Council's Chief Executive is responsible for reviewing and approving the information provided in this report prior to its publication.

2. COUNCIL PRIORITY REPORT

- 2.1** The Council adopted its Corporate Plan 2025–2028 ("the Plan") in September 2025. The Plan outlines the Council's purpose, vision, values, key priorities, and measures of success.

- 2.2** Progress on key actions identified in the Corporate Plan for Q3 (October-December 2025) include:

- Three proposals for Local Government Reorganisation were submitted to Government by the 28 November deadline. Following debate at Full Council, Cabinet selected a preferred option for one unitary authority for Gloucestershire. The statutory consultation will conclude in March and work is underway to establish a programme portfolio and governance for the next phase.
- The Climate Board held its inaugural meeting in November, considering options to reduce emissions from waste and buildings. As part of this, the Council announced plans to replace the district's diesel waste fleet with 30 lorries running on HVO and one electric vehicle, a £7.8m investment aligned to 2030 targets.
- Final grant submissions were made for the installation of 24 new EV charge points across Tetbury, Moreton-in-Marsh, Stow-on-the-Wold and Cirencester. A



safety issue affecting one charger at Brewery, Cirencester is being resolved with the supplier.

- Cabinet approved the updated Capital Fleet Replacement Programme, including replacements for the recycling and food waste fleets, and measures supporting decarbonisation such as use of HVO fuel and one electric vehicle.
- Significant progress was made against the Planning Advisory Service Action Plan, including updating the Development Management Negotiation Protocol, completing process mapping across the service, and advancing improvements to IT systems for Enforcement. Recruitment to new roles also commenced.
- Regulation 18 consultation on the new Local Plan was completed, with Development Management policies drafted to ensure the plan is “green to the core” and on track for submission in December 2026.
- Town and parish engagement intensified, with two district forums attended by over 150 clerks and 13 public meetings supported by senior members and officers. Local Plan toolkits and LGR newsletters were also issued to strengthen engagement.
- The leisure contract continued to perform strongly, exceeding targets for gym memberships, participation and Learn to Swim. The Corinium Museum also delivered a major programme of activity during the Cirencester History Festival and achieved multiple awards, including a silver award at the Bristol, Bath, Somerset and Gloucestershire Tourism Awards 2025.
- All UK Shared Prosperity Fund and Rural England Prosperity Fund allocations are now fully committed and projects are progressing well, with no expectation that the Council will require the Government's extension to September 2026.

2.3 An overview of progress against all actions in the Corporate Plan is attached at Annex A and the Council Priority highlight report is attached at Annex B.

3. SERVICE PERFORMANCE

Overall, the Council delivered strong performance across most key services in Q3. Council Tax and Business Rates collection were above target, planning applications were processed well within agreed timescales and customer satisfaction, regulatory compliance, waste services and leisure participation all remained strong.

A smaller number of services experienced ongoing pressures. Processing times for Council Tax Support and Housing Benefit change events, although improving, remain above cumulative targets due to earlier delays and case complexity. Land Charges performance dipped following staffing shortages but is now recovering, planning appeals allowed remain above target on a cumulative basis, affordable housing



delivery is below target and recycling rates were affected by seasonal reductions in garden waste.

3.1 Service performance above target:

- Percentage of Council Tax Collected (85.08% against the quarterly target of 85%)
- Percentage of Non-domestic rates collected (78.84% against the quarterly target of 78%)
- Percentage of Housing Benefit overpayment due to LA error/admin delay (0.26% against a target of 0.35%)
- Customer Satisfaction (98.87% against a target of 90%)
- Percentage of major planning applications determined within agreed timescales (100% against a target of 70%)
- Percentage of other planning applications determined within agreed timescales (92.16% against a target of 90%)
- Building Control Satisfaction (98.75% against a target of 90%)
- Percentage of high-risk food premises inspected within target timescales (100% against a target of 95%)
- Percentage of high-risk notifications risk assessed within 1 working day (100% against a target of 95%)
- Residual Household Waste per Household (kg) (90.02 against a target of 96)
- Missed bins per 100,000 Collections (75 against a target of 80)
- Number of gym memberships (4,693 against a target of 4,250)
- Number of visits to the leisure centres (140,485 visits against a target of 135,595)

3.2 Service Performance near target:

- Processing times for Council Tax Support New Claims (20.07 days against a target of 20 days)
- Percentage of minor planning applications determined within agreed timescales (86.11% against a target of 90%)

3.3 Service Performance below target:

Processing times for Council Tax Support Change Events (8.52 days against a target of 5 days) and Housing Benefit Change of Circumstances (9.52 days against a target of 4 days).



The Council saw a reduction in processing times for both Council Tax Support (CTS) change of events and Housing Benefit (HB) changes of circumstances compared to Q2. However, cumulative averages remain above the respective targets of 5 days for Council Tax Support and 4 days for Housing Benefit.

Although the cumulative processing time for Council Tax Support Change of Events remains above target, in-quarter performance continued to improve. The average processing time between October and December was 5.3 days, just slightly over the target. While further reductions are expected, the cumulative nature of the measure means it is unlikely to return within target before the end of the financial year.

Housing Benefit continues to experience pressure, driven by the complexity of cases and the volume of DWP-mandated Full Claim Reviews. Many of these reviews require extensive evidence, creating unavoidable delays even as the team works to keep cases moving. The remaining HB caseload is now highly concentrated among pension-age households and temporary accommodation, meaning fewer routine changes are coming through. With a smaller flow of day-to-day updates, any delay has a sharper impact on overall processing times, though the team continues to prioritise the most time-sensitive and higher-risk cases.

To strengthen financial resilience for residents, the Council continued to deliver targeted support through the Low Income Family Tracker (LIFT) during the quarter. Key campaigns included:

- Benefit Maximisation – Targeted outreach to households receiving Universal Credit who are not currently claiming Council Tax Reduction, encouraging take-up of available support.
- Financial Hardship Intervention – Proactive engagement with residents in Council Tax arrears to promote applications to the Council Tax Reduction Hardship Fund.
- Pension Credit Outreach – Direct contact with residents who may be eligible for Pension Credit to provide guidance and increase benefit take-up.
- Accuracy and Assurance – Ongoing checks on Severe Disability entitlements within the benefits system continued, with no impact on Quarter 3 performance.

These campaigns are helping the Council proactively identify financially vulnerable households and ensure residents receive the support they are entitled to.

Percentage of Planning Appeals Allowed (cumulative) (42.65% against a target of 30%)



Between October and December, ten planning appeals were determined. Of these, two were allowed in favour of the applicant, giving an allowance rate of 20% for the quarter. As this measure is cumulative, from April to December a total of 34 appeals have been decided, with 14 allowed and 1 split decision, resulting in a cumulative allowance rate of 42.65%. This figure may fluctuate throughout the year as more appeal decisions are received.

While the general target is for no more than 30% of appeals to be allowed, the Growth and Infrastructure Act 2013 introduced a formal system for assessing the performance of local planning authorities. Under the designation criteria, an authority may be identified as underperforming if 10% or more of its total planning decisions are overturned at appeal.

This measure of decision quality is assessed over a rolling two-year period and is applied separately to major and non-major development categories. It's important to note that the 10% threshold is based on the total number of decisions made, not just those that are appealed. Authorities exceeding this threshold in either category may be designated, allowing applicants to submit certain types of applications directly to the Secretary of State. Currently, the Council is below the threshold for both major and non-major appeals, sitting at around 1.5% and 0.8%, respectively.

Number of affordable homes delivered (cumulative) (41 delivered against a target of 75).

In Cotswold, twenty-one affordable homes were delivered during Q3, bringing the year-to-date total to forty-one. This included 6 homes by Sanctuary in Down Ampney and 15 homes by Cottsway Housing Association in Moreton-in-Marsh. Projections from Registered Providers show 70 completions for 2025/26, well below the target of 100, making it unlikely the district will meet its goal.

The delivery of affordable housing is subject to fluctuations, as most developments take over a year to complete and often progress in multiple phases over several years. Early over delivery at the beginning of the current strategy has also contributed to the dip in recent annual outputs, as the early years set a higher baseline.

Since the adoption of the Local Plan in 2018, the district has delivered approximately 880 affordable homes, averaging around 125 homes per year. Despite the recent dip in completions, this continues to reflect the Council's ongoing commitment to delivering affordable housing and meeting long-term housing needs in the area.



Percentage of official land charge searches completed within 10 days (46.98% against a target of 90%)

The Council's performance against the 10-day target for completing official Land Charges searches declined in Q2, falling from 76.07% in Q2 to 46.98%, below the 90% target.

This was primarily due to the loss of a member of the Land Charges team in September, which created a significant backlog at a time when search volumes remained steady.

Additional administrative support from Customer Services and the Support Services Team has since helped stabilise the service by allowing specialist officers to focus on clearing older cases and managing workflow more effectively.

Following the sharp downturn in September, the Council has shown a clear and sustained recovery. Performance rose from 17% in September to 72% in December, indicating that service levels are steadily returning toward expected standards.

Percentage of FOI requests answered within 20 days (73.17% against a target of 90%)

During Q3, the Council responded to 73.17% of Freedom of Information (FOI) requests within the 20-day timeframe, a decline from 82.61% in Q1 and below the target of 90%. The majority of requests continue to be directed toward Development Management, Environmental Services (ERS), Revenues and Benefits and Housing, reflecting sustained public interest in these areas.

To strengthen transparency and improve FOI performance, the Council is taking a proactive approach to reviewing internal processes and identifying opportunities for improvement. This includes exploring ways to streamline request handling, enhance coordination across high-volume service areas, and reinforce awareness of statutory response times. By embedding best practices and promoting a culture of responsiveness, the Council aims to restore compliance with national standards and ensure residents continue to receive timely access to information.

Percentage of household waste recycled (55.64% against a target of 61%)

During Q3, the Council's household recycling rate fell by 2.5% compared to the same quarter last year, reflecting a wider national trend influenced by seasonal and structural factors.



Despite the recent dip, the Council continues to demonstrate strong performance. According to the latest 2023/24 national results on local authority waste management, the district ranks within the top 25 councils in England for household recycling and remains firmly in the top quartile nationwide. This achievement underscores the Council's sustained commitment to environmental stewardship and effective waste management practices.

Nationally, recycling rates continue to vary widely: in 2023/24, councils in England recorded household recycling rates ranging from 15.8% to 62.9%, with a national average of 42.2%, highlighting the considerable spread between the highest- and lowest-performing areas. Against this backdrop, Cotswold continues to perform strongly with a recycling rate of 57.1%, placing the district firmly within the top tier nationally.

3.4 A full performance report is attached at Annex C.

3.5 As previously agreed, where possible, broader benchmarking has been included in the full performance report to gain a more robust and insightful evaluation of performance. Where benchmarking data is not currently available or outdated, this is noted, and further investigations will be undertaken to look at options.

4. OVERVIEW AND SCRUTINY COMMITTEE

This report will be reviewed by the Overview and Scrutiny Committee at its meeting on 13 April 2026. The draft minutes of that meeting will be circulated to all Members and any recommendations from the Committee will be reported to Cabinet.

5. FINANCIAL IMPLICATIONS

5.1 There are no direct financial implications from this report.

6. LEGAL IMPLICATIONS

6.1 None specifically because of this report. However, a failure to meet statutory deadlines or standards in some services may expose the Council to legal challenge and/or financial liability.



7. RISK ASSESSMENT

7.1 Contained in this report.

8. EQUALITIES IMPACT

8.1 None

9. CLIMATE AND ECOLOGICAL EMERGENCIES IMPLICATIONS

9.1 Contained in this report.

10. BACKGROUND PAPERS

10.1 None

(END)

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Our Cotswolds, Our Plan: Action Plan 2025-28

Priorities	Sub-Priority	Action	Portfolio Holder	Accountable Officer(s)	Updated By	Start date	End date	Status	Q3 Update
Preparing for the Future	Driving organisational and cultural change to be fit for the future	Transformation - Develop Strategy Action Plan	Cllr Mike Evey Cllr Tristan Wilkinson	Helen Martin	Helen Martin	Aug-25	Mar-28	On Target	Plan further refined and cross referenced to the ICT development programme. Meeting with Portfolio members being arranged to update.
Preparing for the Future	Driving organisational and cultural change to be fit for the future	Transformation through changing existing or creating new service delivery models, and/or making changes to the organisation structure, roles, processes or technology to improve outcomes, as a result of introducing new ways of working, and/or to reduce the costs of services.	Cllr Tristan Wilkinson	Helen Martin	Helen Martin	Oct-25	Mar-28	On Target	Several of the restructures are underway and implementing. Workstream 2 of the technical programme will pick up digital solutions for CDC.
Preparing for the Future	Driving organisational and cultural change to be fit for the future	Digital Transformation: accelerating the use of digital technology to improve council services, enhance accessibility, and promote digital inclusion across communities.	Cllr Tristan Wilkinson	Helen Martin	Helen Martin	Oct-25	Mar-28	On Target	Workstream 1 of the technical programme will pick up AI elements and work underway to define CDC specific projects. Some AI already in use and case studies will be developed.
Preparing for the Future	Preparing for Local Government Reorganisation	Prepare the LGR submission to government. Prepare the next phase of the LGR Programme. Implement the governments decision.	Cllr Mike Evey	Jane Portman	Jane Portman	already commenced	Mar-28	On Target	Three proposals for local government reorganisation across Gloucestershire submitted by the Government's deadline of 28 November. Following debate at Full Council, Cabinet met to decide their preferred proposal. The preferred proposal of Cotswold District Council is for one unitary authority for Gloucestershire. The programme is now preparing for the statutory consultation of the viable proposals which is due to start in February. Work is also underway to establish a portfolio and programme team to lead the next phase of work. It is expected that the Government will decide on the proposal to be implemented in the summer.
Preparing for the Future	Preparing for Local Government Reorganisation	Consult with other local authorities to inform possible options for establishing a Strategic Authority	Cllr Mike Evey	Jane Portman	Jane Portman	already commenced	Mar-28	On Target	The three options remain under review until the Government has made a decision on the proposal to be implemented for Local Government Reorganisation in Gloucestershire.

Preparing for the Future	Developing our workforce	Deliver the People and Culture Strategy	Cllr Mike Every	Angela Claridge	Angela Claridge	Sep-25	Mar-28	On Target	Progress includes: Staff recognition awards aligned to workforce values; utilising the staff group "Culture Club" as a sounding board for workforce initiatives; coaching scheme launched on a pilot basis; revised onboarding & staff buddying system trialled and promotion of existing employee benefits.
Preparing for the Future	Developing our workforce	Deliver the Internal Communications Plan, to keep staff informed and engaged in organisational development and LGR	Cllr Mike Every	Matt Abbott	Matt Abbott	Sep-25	Mar-28	On Target	Fortnightly LGR updates now BAU. Q3 saw work undertaken to bring the council's values to life. This included an end of year staff awards, aligned with the values. The council is broadly on track with all of the KPIs set for internal communications, with activity and measures in place for Q4 to address areas where KPIs aren't quite being hit. Feedback from the Publica staff survey was very positive about internal comms at CDC, with particular mention of all staff briefings. In Q4, CDC is running its own all staff-engagement survey.
Preparing for the Future	Developing our workforce	Consideration of a small number of functions currently in Publica in light of their focus core function delivery	Cllr Mike Every	Jane Portman	Jane Portman	Jul-25	Dec-25	On Target	Work continues to review all services provided by Publica, in readiness for the Government's decision on Local Government Reorganisation. Once the decision is made, services currently provided by Publica will be subject to decision by the Shareholder Board as to the appropriate way forward.
Preparing for the Future	Deliver the new Local Plan	Adopt the new Local Plan, providing a robust development framework for the Cotswold area post 2028 that provides affordable housing, employment and infrastructure for present and future generations whilst conserving and enhancing the national landscape.	Cllr Juliet Layton	Geraldine LeCointe	Andrew Maxted	already commenced	Dec-27	On Target	Regulation 18 consultation complete, and evidence on track for submission in December 2026.
Delivering good services	Ensure value for money and good standards	Develop a Fleet Replacement programme	Cllr Andrea Pellegram	Peta Johnson	Peta Johnson	already commenced	Apr-26	On Target	January Cabinet resolved to approve the updated Capital Fleet Replacement Programme, including the replacement of the recycling and food waste fleets. This included steps towards the decarbonisation of services i.e. one electric vehicle, and the use of Hydrotreated Vegetable Oil as a diesel replacement where the sustainability of the fuel can be assured.

Delivering good services	Ensure value for money and good standards	Improve and digitise engagement with the customers of the Waste and Environment Services	Cllr Andrea Pellegram	Peta Johnson	Peta Johnson	already commenced	Mar-28	On Target	In-cab systems are in the process of being rolled out on the street cleansing services. This will provide real time information that will support improved issue resolution.
Delivering good services	Ensure value for money and good standards	Adapt to changes in Waste legislation	Cllr Andrea Pellegram	Peta Johnson	Peta Johnson	already commenced	Mar-28	On Target	Current understanding of changes in waste legislation are being used to model the potential impact on waste flows and the design of the replacement recycling vehicles.
Delivering good services	Ensure value for money and good standards	Implement the Planning Advisory Service action plan	Cllr Juliet Layton	Geraldine LeCointe	Harrison Bowley	already commenced	Aug-26	On Target	In Q3, the focus has been on recruitment following the re-structure of the Development Management, Enforcement and Planning Policy teams in Q2. Within the NBHE team, reporting mechanisms have been introduced to begin monitoring response times for key stakeholders. Pre-application fees have also been reviewed ahead of the next financial year, and work has begun reviewing the pre-application service offered by the LPA ready for an update at the beginning of April. Finally, works to improve digitisation of the development management procedures has reached a key point, with testing of a new Enterprise system currently underway.
Delivering good services	Enhance financial resilience and make best use of our assets	Maintain financial sustainability over the MTFS-period (2026/27 to 2029/30) following the outcome of the Fair Funding 2.0 review.	Cllr Patrick Coleman	David Stanley	David Stanley	Apr-26	Mar-28	Not Scheduled to Start During Quarter	Not Due to Start this Quarter
Delivering good services	Play our part in maintaining and enhancing the public realm	Introduce charging to sustain Council owned public toilets.	Cllr Tony Dale	Claire Locke Sue Hughes	Claire Locke	already commenced	Dec-25	Off Target, but action being taken to ensure delivery	Charging mechanisms have now been introduced to all public conveniences, although charging has not yet been implemented at Northleach pending the conclusion of discussions regarding the future ownership and management of those facilities.
Delivering good services	Play our part in maintaining and enhancing the public realm	Deliver the new Parking Strategy.	Cllr Tony Dale	Sue Hughes	Sue Hughes	already commenced	Mar-28	On Target	Car parking strategy approved, moved to implementation and BAU phase.

Delivering good services	Play our part in maintaining and enhancing the public realm	Invest in and maintain our car parks	Cllr Tony Dale	Alan Hope	Andrew Turner	already commenced	Mar-28	On Target	Capital investment works complete, maintenance ongoing. Collaboration between service areas to address issues as they arise.
Delivering good services	Deliver the new Local Plan	Ensure our planning policies deliver our corporate priorities and promote carbon neutral development and sustainable infrastructure for our communities	Cllr Juliet Layton	Geraldine LeCointe Jo Symons	Andrew Maxted	already commenced	Dec-26	On Target	DM policies drafted and this along with strategic policies aim to ensure the Plan is green to the core. Draft Plan is on target for submission to the Planning Inspectorate by December 2026.
Responding to the climate emergency	Support and Enable Residents & Businesses	Expand the network of Electric Vehicle Charge Points	Cllr Mike McKeown	Olivia McGregor	Olivia McGregor	already commenced	Mar-28	On Target	The final submission has been made to the grant body paying for 50% of costs to install the 24 EVCPs in West Street, Tetbury, Old Market Way in Moreton-in-marsh, Maugersbury Road in Stow-on-the-wold and Brewery car park in Cirencester. A safety issue relating to 1 EVCP at Brewery car park is preventing it from being operational. Property and Assets are in conversation with supplier Connected Kerb to resolve the issue.
Responding to the climate emergency	Decarbonise Council Operations	Embed climate action into council services to reduce the council's operational carbon emissions	Cllr Mike McKeown	Olivia McGregor	Olivia McGregor	already commenced	Mar-28	On Target	The Council is embedding climate considerations across policies and decision-making. A Climate Board has been established to support this. The inaugural meeting was held in November 2025. The meeting considered options to reduce waste fleet emissions and building emissions. Actions were put forward to integrate work into service area planning some of which have already come forward to fruition. For example Waste services account for 43% of the authority's emissions, and the Council have acknowledged using bin lorries which run on cleaner fuel is vital for its decarbonisation plans. As a result the Council has announced the district's diesel fleet will be swapped for 30 lorries running on hydrotreated vegetable oil (HVO) and one electric vehicle, in a move costing the council £7.8m.
Responding to the climate emergency	Increase resilience to the effects of climate change	Work in partnership to respond to the Climate Risk and Vulnerability Assessment	Cllr Mike McKeown	Olivia McGregor	Olivia McGregor	Oct-25	Mar-28	On Target	A Climate Risk and Vulnerability Assessment (CRVA) has been produced and is publically available. Next steps are currently being planned

Responding to the climate emergency	Deliver high quality retrofit advice and support installation of renewables across the district	Deliver high quality retrofit advice and support installation of renewables across the district through policy, partnership working and initiatives	Cllr Mike McKeown	Olivia McGregor	Olivia McGregor	already commenced	Mar-28	On Target	A series of retrofit events are planned to take place over the coming months through to Spring. Planning policy to encourage renewable deployment across the District has been drafted and is progressing through the Local Plan approval process.
Delivering Housing	Deliver the new Local Plan	Allocate sites in line with Government requirements that will boost housing delivery whilst taking account of the significant constraints across the district	Cllr Juliet Layton	Geraldine LeCointe	Andrew Maxted	already commenced	Dec-26	On Target	Regulation 18 consultation now complete and call for sites closed. Received nearly 200 sites, many of which have been submitted previously. Housing Needs Assessment Interim Report received. All on track for submission of Plan in December 2026.
Delivering Housing	Working with our partners to deliver more affordable homes	Move forward a Pipeline of Rural Affordable Housing Sites and develop ways to increase Affordable Housing delivery	Cllr Juliet Layton	Alan Hope	Alan Hope	already commenced	Mar-28	On Target	Partnership working to deliver affordable housing ongoing. Rural Exception site Pipeline continues to be developed.
Delivering Housing	Understanding everyone's housing needs	Adopt and implement the Preventing Homelessness Strategy	Cllr Juliet Layton	Calire Locke Caroline Clissold	Caroline Clissold	Sep-25	Mar-28	On Target	CDC adopted the Preventing Homelessness Strategy for 2025-2030 in September 2025. An annual review will be carried out and measured against the actions, but will be also be monitored regularly to ensure that all actions are on target.
Delivering Housing	Understanding everyone's housing needs	Continue to monitor housing needs to inform the councils revised Housing Strategy	Cllr Juliet Layton	Claire Locke Caroline Clissold	Caroline Clissold	already commenced	Mar-28	On Target	Quarterly reviews of H-CLIC data are being carried out to inform housing trends and monitor increases in contacts.
Delivering Housing	Understanding everyone's housing needs	Refocus the Housing Strategy on Strategic Actions.	Cllr Juliet Layton	Alan Hope	Alan Hope	Aug-25	Oct-25	Complete	Oct-25 date for first draft achieved. Co-ordination with Local Plan Update activities and comments from stakeholders being finalised.
Supporting communities	Strengthen our links with town and parish councils and key stakeholders	Engage with and support town and parish councils to prepare for Local Government Reorganisation	Cllr Mike Every	Matt Abbott	Matt Abbott	Jun-25	Mar-28	On Target	Q3 saw a significant amount of engagement with town and parish councils, on both the local plan and LGR. Two forums were held, one in the north of the district and one in the south, where LGR was on the agenda, talking about Neighbourhood Partnerships. Over 150 clerks attended across the two sessions. On the local plan, CDC issued a toolkit and newsletter launch of the Local Plan consultation to town and parish council clerks in November, followed by a newsletter in December. The leader, deputy leader, and senior officers also attended 13 public meetings, organised by town and parish councils and ward members, on the local plan consultation. CDC also led on the development of an LGR newsletter, issued to town and parish councils in November.

Supporting communities	Encourage community health and wellbeing	Enable networking and public engagement events to help local residents to access support services	Cllr Tony Dale	Joseph Walker	Clare Jobling	already commenced	Mar-28	On Target	Strengthening Community events have been running through the year, with the last two scheduled for February 2026. Alongside, the Community Wellbeing team have been working with partners from the NHS, Bromford Housing and voluntary and community sectors to support a range of other drop-ins.
Supporting communities	Encourage community health and wellbeing	Celebrate the contribution of individuals and local groups	Cllr Tony Dale	Joseph Walker	Clare Jobling	already commenced	Mar-28	On Target	The Unsung Heroes awards have been running since 2024. There was a round in November 25, celebrating both adult and youth volunteers. The Council hosted a celebration event in December, inviting winners and runners up to a Christmas themed event to recognise their contribution.
Supporting communities	Encourage community health and wellbeing	Promote community activity through Crowdfund Cotswold	Cllr Tony Dale	Joseph Walker	Clare Jobling	already commenced	Mar-28	On Target	The Council ran a funding round, closing in September, launching 4 projects of which 2 have been successful. There is a spring round launching in February.
Supporting communities	Encourage community health and wellbeing	Ensure the leisure and culture contracts deliver core provision and positive community outcomes	Cllr Tony Dale	Joseph Walker	Lisa Caton	already commenced	Mar-28	On Target	The leisure contract continues to perform well, exceeding targets for gym memberships, participation, and the Learn to Swim programme. Community involvement has also increased, with partnerships including The Churn Project, The Long Table, and donations of swimming aids. The Corinium Museum delivered significant activity during the Cirencester History Festival and received multiple awards in the period, including a Silver at the BSST Awards.
Supporting communities	Encourage community health and wellbeing	Work with Cotswold Youth Network to champion to contribution and needs of young people	Cllr Tony Dale	Joseph Walker	Clare Jobling	Oct-25	Mar-28	On Target	The COuncil has been working closely with World Jungle, who convene the CYN, and hold the Cotswold contract for the current Holiday Activity and Food programme. Supporting on improving provision for older children, working with Freedom Leisure, and helped run an event in Moreton for young people in December.
Supporting communities	Support our residents in crises	Coordinate a partnership response to address financial hardship and the cost of living	Cllr Tony Dale	Joseph Walker	Clare Jobling	already commenced	Mar-28	On Target	CDC received its allocation of HSF 7 from GCC in quarter three. Support has been prioritised to sustain existing provision, as HSF finishes at year end, and will be succeeded by the Crisis and Resilience Fund. CDC engaged in a CRF planning meeting in December.

Supporting communities	Support our residents in crises	Work with the NHS Integrated Locality Partnership to improve the quality of life of children and vulnerable households	Cllr Tony Dale	Joseph Walker	Clare Jobling	already commenced	Mar-28	On Target	Strong partnership approach with NHS, and other partners. Drop in event in Stow, a ward prioritised by NHS, did not attract as many residents as hoped for, exemplifying the challenge of rural outreach. However, coimunity appointment days hosted at Cirencester Leisure Centre have proved successful.
Supporting communities	Support our residents in crises	Work with the Cotswold Community Safety Partnership to improve road safety and reduce antisocial behaviour	Cllr Tony Dale	Joseph Walker	Clare Jobling	already commenced	Mar-28	Off Target, but action being taken to ensure delivery	Following discussion through the Community Safety Partnership, the local Neighbourhood Policing team worked with their traffic enforcement and comms team to launch a promotional video for Community Speedwatch, filmed in Kempsford, and reposted by CDC. The CSP also reviewed the Strategic Needs Assessment for Road Safety. GCC are currently trying to recruit a road safety coordinator, who will lead on this theme for the county, and who will be invited to attend the CSP. The CSP met at Skillzone in October, to review their youth training provision, and is working to alert local partners to this offer to help educate youngpeople about risks and behaviour.
Supporting communities	Deliver the new Local Plan	Through our Local Plan review aim to ensure that development provides the necessary infrastructure for communities and that this provision is aligned with the phasing and delivery of development	Cllr Juliet Layton	Geraldine LeCointe	Andrew Maxted	already commenced	Mar-28	On Target	Regulation 18 consultation for draft Local Plan now completed. The draft Local Plan will seek to allocate sites with appropriate provision of infrastructure and evidence is being undertaken in this regard. Currently on target for submission in December 2026.
Supporting the economy	Develop the skills of our residents	Support key sectors to create new highly skilled jobs, including through promotion of apprenticeship opportunities.	Cllr Tristan Wilkinson	Joseph Walker Paul James	Paul James	already commenced	Mar-28	On Target	Working with Cirencester Chamber of Commerce, through a UK Shared Prosperity funded programme, to enhance opportunities for young people, including promoting apprenticeships.
Supporting the economy	Grow a strong and sustainable economy	Deliver a programme of activities through the Shared Prosperity and Rural England Prosperity Funds	Cllr Tristan Wilkinson	Joseph Walker Paul James	Paul James	Mar-25	Mar-26	On Target	All UKSPF & REPF funds are allocated and projects are progressing. The Government has extended the date for delivery to the end of September 2026, but as most of our projects are either delivered or underway we are unlikely to need this.

Supporting the economy	Grow a strong and sustainable economy	Deliver the actions set out in the refreshed Green Economic Growth Strategy.	Cllr Tristan Wilkinson	Joseph Walker Paul James	Paul James	Jan-25	Mar-28	On Target	The Green Economic Growth Strategy is overseen by the Cotswold Economic Advisory Group. The refreshed strategy was adopted by Cabinet in March 2025 and delivery of the actions is underway.
Supporting the economy	Grow a strong and sustainable economy	Work with the Royal Agricultural University on their aspiration for the Innovation Village	Cllr Tristan Wilkinson	Joseph Walker Paul James	Paul James	already commenced	Mar-28	On Target	A planning application was submitted in April 2024. It is hoped it will be determined shortly. The Council continues to support the RAU in other aspects of this project in parallel with the application being considered.
Supporting the economy	Grow a strong and sustainable economy	Promote the Growth Hub to support existing businesses and encourage the growth of start-ups	Cllr Tristan Wilkinson	Joseph Walker Paul James	Paul James	already commenced	Mar-28	On Target	The Growth Hub is funded for 2025-26 via UKSPF and provides support to start-up and growing businesses. Officers work closely with the team at the Growth Hub and hold regular monitoring meetings. Cirencester Growth Hub is the best-performing Growth Hub in the county. A bid to the County's Strategic Economic Development Fund (SEDF) for the financial years 2026-27 and 2027-28.
Supporting the economy	Grow a strong and sustainable economy	Work with partners to realise benefits of the Creative Cotswolds Action Plan	Cllr Tony Dale	Joseph Walker	Lisa Caton	Sep-25	Mar-28	On Target	The appointment of the Leisure and Culture Support Officer, who commenced on 20th January 2026, will enable this work to be effectively facilitated.
Supporting the economy	Manage the opportunity and impact of the visitor economy	Refresh the Tourism Destination Management Plan	Cllr Tony Dale	Joseph Walker Chris Jackson	Chris Jackson	Sep-25	Sep-26	On Target	The team worked with partner Gloucestershire authorities to submit a bid to the Strategic Economic Development Fund over the summer. The bid was successful and will now support the delivery of a refreshed Destination Management Plan (DMP).
Supporting the Economy	Deliver the new Local Plan	Promote policies that maintains and protects our existing employment sites whilst supporting sustainable economic growth in the district	Cllr Juliet Layton	Geraldine LeCointe	Andrew Maxted	already commenced	Dec-26	On Target	Regulation 18 consultation for draft Plan now completed. The Plan will seek to protect our existing employment sites and support sustainable economic growth; evidence is also being undertaken in this regard. Currently on target for submission in December 2026.



COTSWOLD

District Council

COUNCIL PRIORITIES REPORT

October – December 2025

Our Purpose, visions, priorities and values

Cotswold District Council serves one of the UK's most iconic areas, home to 90,000 residents across more than 100 communities and parishes. We work to protect its unique character, support its economy, and improve lives.

Our Purpose

We provide high-quality services that meet community needs—from planning and housing to climate action and wellbeing. As local government faces significant change, we remain focused on delivering with **purpose, integrity, and ambition**. This strategy sets out our vision to **2028**, when national plans for Local Government Reorganisation are expected to create a new unitary council, and includes an action plan to leave a lasting legacy.

Our Vision

To leave a legacy of:

- Affordable, sustainable housing
- Resilient, connected communities
- A thriving local economy
- A protected natural environment
- Transparent, high-quality public services

Our Values

Everything we do is built on trust, transparency, and listening to our communities. We:

- **Put communities first** – their priorities are our priorities
- **Work as one team** – for residents and businesses
- **Focus on efficiency and value** – ensuring good use of resources
- **Set up for success** – to deliver against our corporate priorities

Our strategic priorities

Between now and 2028, the priorities we've set out to achieve this legacy are:

- Preparing for the future
- Delivering good services
- Responding to the climate emergency
- Delivering housing
- Supporting communities
- Supporting the economy



Preparing for the Future

The Context

Gloucestershire is set to move to a unitary structure in 2028, with Cotswold District Council services transferring to a successor authority. Our focus remains on ensuring a smooth transition while continuing to meet residents' needs. We are driving organisational change, developing our workforce, and progressing a new Local Plan. Engagement with town and parish councils and collaboration with partner authorities is underway to design future services and ensure decisions reflect local priorities.

Actions we are taking

In 2025, the Council launched an ambitious transformation programme to modernise services, strengthen digital capabilities, and prepare for future governance changes. This reflects our commitment to delivering accessible, high-quality services while ensuring financial sustainability and organisational resilience. Against a backdrop of rising demand, technological change, and shifting national policy, our approach aims to create a more agile, efficient, and customer-focused organisation.

The programme is underpinned by a clear vision: improving outcomes for residents, enhancing organisational culture, and ensuring readiness for potential changes in local government. An initial Strategy Action Plan has been drafted and is being assessed to prioritise initiatives based on speed, cost, and scalability. The plan includes proposals for service redesign, restructures, and expanded use of digital solutions, and has been aligned with the ICT development programme. Digital transformation is central to this work, with several AI initiatives being scoped to improve accessibility and support digital inclusion. Workstreams within the technical programme are defining CDC-specific AI and digital projects, with meetings scheduled with Lead Members and ICT to assess feasibility and delivery options.

In parallel, the Council is actively engaged in Local Government Reorganisation (LGR). Proposals for both single- and two-unitary models were considered at Overview and Scrutiny on 17 November and Full Council on 26 November, with Cabinet supporting a single Gloucestershire unitary authority. Planning for the next phase is underway using a new programme and portfolio management approach, supported by officer engagement and a workshop on 10 November. The programme is preparing for statutory consultation, expected to begin in February.

Discussions with Gloucestershire Leaders have progressed, with agreement to continue considering three strategic options for devolution and a strategic mayoral authority until the Government decides on the LGR model.

The People and Culture Strategy has made significant progress. In September 2025, Cabinet approved the Year 1 Implementation Plan, workforce values, and a Communications and Engagement Strategy. Fortnightly LGR updates via the staff portal and six-weekly all-staff briefings continue to support staff engagement. New visuals and content were rolled out in Quarter 3 to embed the Council's values, alongside initiatives such as improved onboarding, a pilot coaching scheme, and enhanced recognition. Publica and shareholder councils have also prioritised reviews of Publica-delivered services to ensure alignment with future governance arrangements.

Looking ahead, the Council is preparing to adopt a new Local Plan, which will provide a development framework for the Cotswold area post-2028. This plan will deliver affordable housing, employment opportunities, and infrastructure for current and future generations, while conserving and enhancing the district's nationally significant landscape. Regulation 18 consultation has now been completed, and evidence remains on track for submission in December 2026.



Delivering Good Services

The Context

The Council is committed to providing high-quality services that offer value for money, tackle climate change, and meet community needs. We've strengthened accountability by bringing key services in-house, advanced a Local Plan update to deliver sustainable growth, and earned positive feedback from the LGA for our progress. Current priorities include modernising waste services, improving digital engagement, preparing for legislative changes, and implementing strategies for parking, financial resilience, and income generation. These actions ensure services remain responsive, sustainable, and future-ready.

Actions we are taking

The Council is driving forward a series of strategic projects to modernise waste, environmental, planning, and infrastructure services, aligning them with wider transformation and climate ambitions. A major focus is delivery of the updated Fleet Replacement Programme, approved by Cabinet in January. This includes replacing the ageing kerbside recycling and food waste fleets and taking early steps towards decarbonisation through the introduction of one electric vehicle and the use of Hydrotreated Vegetable Oil where its sustainability can be assured. Work is also assessing refurbishment opportunities for other vehicles to reduce costs and environmental impact, ensuring the fleet strategy supports future service resilience and the transition to ultra-low-emission technologies.

Improving customer engagement is another priority. The Council is reviewing existing digital tools—including the Waste Wizard and collection day checker—to identify opportunities for a more intuitive, real-time customer experience. In-cab systems are now being rolled out on street-cleansing services to support faster issue resolution and further digitisation of operational data.

The Council is preparing for significant changes in national waste legislation. Current policy expectations are being used to model potential impacts on waste flows and inform the design and capacity of new recycling vehicles, including possible requirements for collecting additional materials such as flexible plastics.

In planning, the Council continues to implement recommendations from the Planning Advisory Service (PAS) peer review. Q3 activity focused on recruitment following the restructure of Development Management, Enforcement, and Planning Policy teams. New reporting mechanisms have been introduced to monitor stakeholder response times, pre-application fees have been reviewed ahead of the next financial year, and work is underway to refresh the pre-application service for April.

Digitisation of development management processes has reached a key stage, with testing of the new Enterprise system currently in progress. These improvements support more efficient case management, enhanced enforcement, and opportunities to pilot AI tools to streamline correspondence and reporting.

Work is also progressing across parking services. The new Car Parking Strategy has been approved and has now moved into implementation and business-as-usual. Capital investment works across car parks are complete, with ongoing maintenance and cross-service collaboration to address operational issues. Charging mechanisms have been introduced at all Council-owned public toilets, except Northleach pending discussions on future ownership and management.

Responding to the Climate Emergency



The Context

The climate and ecological crises pose existential threats. A report published by Defra on the 20th January 2026 stated ecosystem degradation is occurring across all regions and every critical ecosystem is on a pathway to collapse (irreversible loss of function beyond repair). The report states the consequences of this ecosystem degradation include geopolitical instability, economic insecurity, conflict, migration and increased inter-state competition for resources. Cotswold District Council declared a climate and ecological emergency in 2019 and adopted its Climate Emergency Strategy (2020–2030), setting ambitious targets: an 80% reduction in emissions by 2030 and net zero by 2045.

Actions we are taking

The Council has made strong progress in cutting operational carbon emissions, achieving a 41% reduction since 1990, from 4.7 million kg CO₂e to 2.76 million kg CO₂e in 2022–23 (latest data). Key initiatives include:

- **EV infrastructure:** 24 new EV chargers have been installed across Stow-on-the-Wold, Moreton-in-Marsh, Tetbury, and Cirencester, bringing the total to 49 Council-installed chargers out of 150 public chargers in the district. This supports residents without off-street parking and aligns with the ambition for an EV charger within a 10-minute walk wherever possible.
- **Embedding climate action:** A Climate Board was established and met for the first time in November 2025, considering options to reduce emissions from buildings and waste services. Actions are being integrated into service planning, with several already progressing.
- **Waste fleet decarbonisation:** Waste and environment services account for 43% of Council emissions. To address this, the district's diesel waste fleet will be replaced with 30 lorries running on hydrotreated vegetable oil (HVO) and one electric vehicle—part of a £7.8m investment supporting long-term decarbonisation.
- **Solar and retrofit schemes:** The Cotswold Home Solar scheme has enabled 53 installations, with 26 more in progress. A countywide retrofit support service launched in January 2025 is providing tailored advice and vetted installers, supported locally by a Retrofit Engagement Officer. Further retrofit events are planned through Spring. Draft planning policies promoting renewable energy deployment are progressing through the Local Plan process, informed by the 2025 Renewable Energy Study to ensure the plan is "Green to the Core."
- **Climate resilience:** A Climate Risk and Vulnerability Assessment (CRVA) has been published, providing evidence on current and future climate risks across Gloucestershire and highlighting best practice and next steps for adaptation. Planning for priority follow-up actions is underway.
- **Community engagement:** Carbon literacy training, behaviour-change campaigns, and funding opportunities such as Crowdfund Cotswolds continue to support local climate action. Partnerships with housing providers, including Bromford, are helping strengthen climate resilience in affordable homes.



Delivering Housing

The Context

Cotswold faces a severe housing affordability crisis, with property prices far exceeding local incomes and a shortage of genuinely affordable homes. Many residents, especially younger people, are forced to leave the area, threatening community resilience. The council is committed to delivering good-quality, affordable housing, prioritising social rent and homes for young people, families, and veterans. New homes will be energy-efficient and carbon-neutral to reduce costs and support sustainability. Tackling homelessness and ensuring long-term housing solutions are central to our strategy because secure housing underpins health, wellbeing, and strong communities.

Actions we are taking

Meeting sharply increased government housing targets while protecting the Cotswolds' unique landscape remains one of the Council's most significant challenges. National policy now requires planning for 18,650 new homes by 2043, more than double previous requirements, despite over 80% of the district being designated National Landscape, severely restricting where development can occur. In response, the Council is rapidly updating its Local Plan. Regulation 18 consultation is now complete, and nearly 200 sites were submitted through the Call for Sites process. Strategic options under consideration include a new settlement near Driffield, extensions to several towns and villages, and smaller-scale developments distributed across the district. All work remains on track for submission of the updated Plan by December 2026.

Alongside meeting housing targets, the Council remains committed to delivering genuinely affordable homes. High land values and property prices, often more than 16 times average rural incomes, continue to create barriers, but partnership working with housing associations and parish councils is ongoing, and the rural exception site pipeline continues to grow. Recent schemes, such as the Avening development opened by HRH The Princess Royal, demonstrate how high-quality, energy-efficient homes can be delivered in rural settings using technologies such as air-source heat pumps and solar panels while maintaining traditional Cotswold character.

The Council's Housing Strategy focuses on meeting diverse housing needs, expanding affordable housing supply, and creating sustainable, climate-resilient homes. Work to refocus the strategy on strategic actions is progressing well, with the first draft achieved in October 2025 and alignment with Local Plan activity underway. Quarterly reviews of H-CLIC data continue to inform emerging trends and ensure that the strategy responds to changes in housing demand.

Preventing homelessness remains a core priority. The Preventing Homelessness Strategy 2025–2030, adopted in September 2025, is now being implemented and monitored. The Council already prevents more than 200 households a year from becoming homeless through early intervention, landlord negotiation, and targeted support. Rough sleeping remains extremely low in the district due to proactive outreach and rapid response arrangements. Ongoing monitoring ensures actions stay on track and resources remain focused where they are most needed.

Looking ahead, the Council will continue to balance housing delivery with environmental stewardship. Draft development management policies aim to make the updated Local Plan "Green to the Core," embedding biodiversity enhancements, green infrastructure, and carbon-neutral design principles. Evidence from the 2025 Renewable Energy Study and other climate resilience work is helping ensure new development supports thriving communities without compromising the Cotswolds' nationally significant landscape.

Supporting Communities



The Context

Cotswold District benefits from strong health outcomes, low crime, and natural beauty. However, challenges remain, particularly for an ageing population in rural areas facing loneliness and limited access to services. Broader issues such as unemployment, low income, poor housing, and lifestyle choices also impact wellbeing. Addressing these requires a collaborative, whole-systems approach using asset-based community development.

Actions We Are Taking

Cotswold District Council continues to strengthen its role as a leader in health and wellbeing, promoting active lifestyles and inclusive community initiatives. The Leisure Strategy, shaped around local priorities, guides investment in facilities and non-facility programmes, overseen by the Active Cotswolds Programme Board across three themes: Healthier District, Connected Community, and Active Environment. The leisure contract continues to exceed performance targets, including gym memberships, participation levels, and Learn to Swim enrolments, supported by partnerships such as The Churn Project and The Long Table. Cultural engagement has also increased through activity at the Corinium Museum, which delivered major events and received several awards, alongside exhibitions such as the Woolly Mammoth and Project Orpheus.

The Holiday Activity and Food (HAF) programme has been renewed for three years, with delivery through providers including World Jungle. Summer HAF 2025 received positive feedback, and planning for future sessions is underway. World Jungle also continues to support youth-focused events including the Cotswold Youth Mobile Festival.

To complement HAF, the Council secured £50,000 for 14 Strengthening Local Communities events. Ten events have already engaged more than 600 residents, with further sessions planned in Northleach, Avening, Mickleton and Kemble.

Strong partnership working remains central, with collaboration from the NHS, Citizens Advice, Severn Wye, Foodbanks, and Carers Hub on cost-of-living pressures, health inequalities, and social isolation. Officers also contribute through the Integrated Locality Partnership and GCC's One Plan Cotswolds group to support children and vulnerable households.

The Cotswold Food Network continues to advance food sustainability through resources such as the Food Procurement Guide, Allotments Mini Guide, and Cookery Classes Guide. Outreach tools, including the Low-Income Family Tracker and the updated Worrying About Money? leaflet, are helping support low-income households. Work is also underway to scope a Venison Supply Project to support food charities.

Youth engagement remains a priority, with support for Northleach Teen Space, digital skills programmes, summer activities, and the Unsung Heroes Young Heroes category, which will return in November.

Crowdfund Cotswold continues to promote community-led initiatives, supporting over £1 million in local projects. Recent bids include community sheds, skateparks, and murals, such as The Churn Project's Community Shed.

Engagement with town and parish councils has stepped up as part of preparation for Local Government Reorganisation and the Local Plan Review. Two forums in Q3 brought together more than 150 clerks, and senior officers attended 13 public meetings on the Local Plan. Town and parish councils received toolkits, newsletters, and a dedicated LGR update.

Finally, the Council continues to work with the Community Safety Partnership to improve road safety and reduce antisocial behaviour. A community speedwatch film will be released shortly and the district supported Operation Shield, a summer town-centre safety initiative.

Supporting the Economy



The Context

The Cotswold economy is diverse, with businesses of all sizes across multiple sectors. While tourism remains a major employer, the district's economic potential goes far beyond visitor activity. Our focus is on creating a resilient, balanced economy by supporting innovation, enhancing digital capability, and promoting green growth. Through targeted investment and partnership working, we aim to nurture high-value, low-impact sectors such as agritech, cyber, medical technology and environmental innovation—providing better opportunities for local people and businesses.

Actions we are taking

The Green Economic Growth Strategy 2025–29 guides economic development activity and is overseen by the Cotswold Economic Advisory Group, which includes key partners such as St James's Place, Cirencester College, and the Royal Agricultural University (RAU). The refreshed strategy focuses on creating high-value, low-impact jobs, supporting sustainable growth, and promoting skills development, including apprenticeships and T-Levels.

Through the UK Shared Prosperity Fund (UKSPF), the Council has delivered projects such as business support via the Growth Hub, heritage restorations, and the rebranding of the Cotswold Water Park area as the Cotswold Lakes. Outreach from the Growth Hub has expanded to towns like Moreton-in-Marsh, and the most recent round of UKSPF and REPF funding has supported initiatives including mentoring for young people, creative co-working spaces, and town centre improvements. Nine projects received over £120,000 from the UKSPF in 2025/26, including £25,000 for Cirencester Chamber of Commerce to support early careers. Additional funding from the Rural England Prosperity Fund (REPF) has supported rural business grants, village hall upgrades, and active travel schemes. Projects funded from 2022–25 are complete, with 2025–26 funding full allocated and projects either completed or underway, including energy efficiency measures, solar panels, and community facility improvements.

Town centres remain a priority. Cirencester's vacancy rate has fallen to 4.8% with refurbished units and new social enterprises such as The Old Department Store occupying former retail spaces. Smaller towns maintain low vacancy rates, though conversions to residential use and loss of critical mass remain concerns. A UKSPF-funded consultant is investigating higher vacancy areas like Lechlade, Moreton-in-Marsh and Tetbury to develop action plans.

The Council is working with partners to grow sectors such as agritech, cyber, and medical tech. Key projects include:

- RAU Innovation Village – £140M scheme, planning application submitted.
- ZeroAvia at Cotswold Airport – advancing hydrogen-electric aviation.
- Fire Service College – expanding as a Centre for National Resilience.
- A417 Missing Link – £460M infrastructure project improving connectivity.

The Growth Hub, funded through UKSPF, continues to provide expert business support and has launched a second round of the Cotswold Catalyst incubator programme for high-potential start-ups. This six-month initiative offers tailored workshops, co-working space, and access to thought leaders, helping businesses scale and thrive. Cirencester Growth Hub remains the best-performing hub in Gloucestershire.

Cultural development is supported through the Creative Cotswolds Action Plan, approved in July 2025, which aims to strengthen the district's cultural sector. Delivery will now be driven forward by the newly appointed Leisure and Culture Support Officer, who started on 20 January 2026, enabling this work to be effectively facilitated and coordinated across programmes.



COTSWOLD

District Council

Delivering great services locally

PERFORMANCE REPORT:

October - December 2025

Summary Index

Area	KPI Name	RAG	Page
Revenues, Benefits and Housing	Percentage of Council Tax Collected	Green	7
	Percentage of Non-Domestic Rates collected	Green	8
	Processing times for Council Tax Support new claims	Orange	9
	Processing times for Council Tax Support Change Events	Red	10
	Processing times for Housing Benefit Change of Circumstances	Red	11
	Percentage of Housing Benefit overpayment due to LA error/admin delay	Green	12
	(Snapshot) Long Term Empty Properties	Grey	13
	(Snapshot) Number of households in B&B/hotel-type accommodation & Hostels (LA owned or managed); and Number of successful 'Move On' into suitable independent/long-term accommodation from B&Bs/hotels/hostels	Grey	14
Customer Experience	Customer Satisfaction - Telephone	Green	15
	Customer Satisfaction - Email	Grey	16
	Customer Satisfaction - Face to Face	Green	17

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Area	KPI Name	RAG	Page
Customer Experience	Customer Call Handling - Average Waiting Time	Grey	18
	Complaints	Grey	20
	Percentage of FOI requests answered within 20 days	Red	21
Development Management and Land Charges	Building Control Satisfaction	Green	22
	Percentage of major planning applications determined within agreed timescales (including AEOT)	Green	23
	Percentage of minor planning applications determined within agreed timescales (including AEOT)	Orange	24
	Percentage of other planning applications determined within agreed timescales (including AEOT)	Green	25
	Total Income achieved in Planning & Income from Pre-application advice	Green	26
	Percentage of Planning Appeals Allowed	Red	27
	(Snapshot) Planning Enforcement Cases	Grey	28
	Percentage of official land charge searches completed within 10 days	Red	29
	Number of affordable homes delivered	Red	30

Summary Index

Area	KPI Name	RAG	Page
Waste and Environment	Number of fly tips collected and percentage that result in an enforcement action		31
	Percentage of high-risk food premises inspected within target timescales		32
	% High risk notifications risk assessed within 1 working day		33
	Percentage of household waste recycled		34
	Residual Household Waste per Household (kg)		35
	Missed bins per 100,000		36
Leisure	Number of visits to the leisure centres & (Snapshot) Number of gym memberships		37

A note on performance benchmarking

Benchmarking can be a useful tool for driving improvement; by comparing our performance with other similar organisations, we can start a discussion about what good performance might look like, and why there might be variations, as well as learning from other organisations about how they operate (process benchmarking). When we embark on performance benchmarking, it is important to understand that we are often looking at one aspect of performance i.e. the level of performance achieved. It does not take into account how services are resourced or compare in terms of quality or level of service delivered, for example, how satisfied are residents and customers? Furthermore, each council is unique with its own vision, aim and priorities, and services operate within this context.

Benchmarking has been included wherever possible ranking against Chartered Institute of Public Finance and Accountancy (CIPFA) Nearest Neighbours model which uses a range of demographic and socio-economic indicators to identify the local authorities most similar to our own. Cotswold's identified Nearest Neighbours are Babergh, Chichester, Derbyshire Dales, East Hampshire, Lichfield, Maldon, Malvern Hills, Mid Devon, South Hams, Stratford-on-Avon, Stroud, Tewkesbury, West Devon, West Oxfordshire and Wychavon. Additional investigations are underway to provide it for those metrics that are missing comparisons.

A RAG (red, amber, green) status has been applied to each KPI to provide a quick visual summary of the status of that KPI for the quarter. Additionally, RAG status has been added to the direction of travel for each metric to show how the performance against last quarter and the same quarter compared to last year is progressing.

A note on Standard Deviation

Standard deviation is included in this report to provide insight into the consistency of performance, not just the average results. While averages show overall trends, standard deviation highlights how much variation exists around those averages. A low standard deviation suggests performance is stable and predictable, whereas a high standard deviation indicates inconsistency, which may warrant further investigation. This helps identify areas where performance may be less reliable, supporting more informed decision-making and targeted improvements. We have used 1 standard deviation in this report to help understand variation in performance and to monitor consistency over time. This approach highlights typical fluctuations around the average, allowing us to identify patterns and potential areas of concern without focusing solely on extreme outliers.

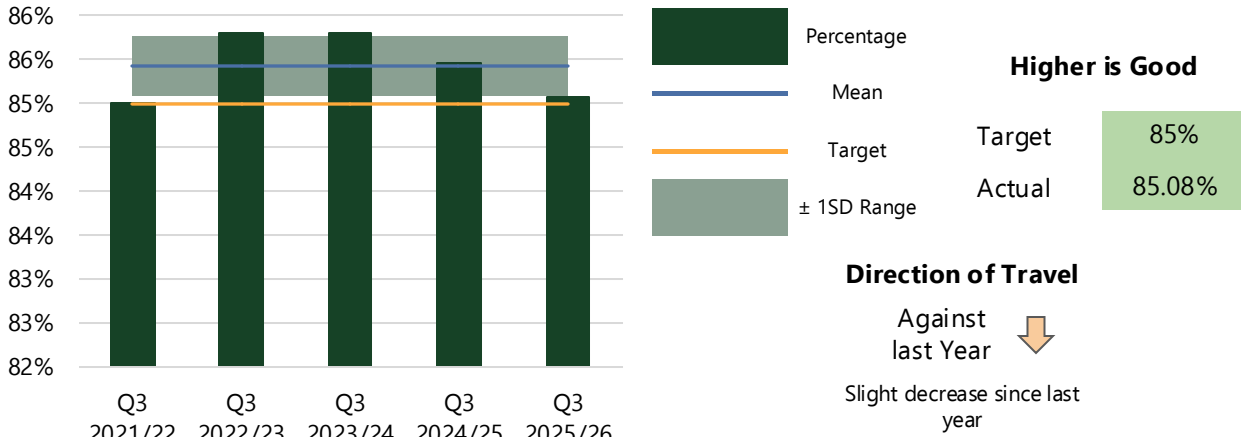
Overall Performance

Overall, the Council delivered strong performance across most key services in Q3. Council Tax and Business Rates collection were above target, planning applications were processed well within agreed timescales, and customer satisfaction, regulatory compliance, waste services and leisure participation all remained strong.

A smaller number of services experienced ongoing pressures. Processing times for Council Tax Support and Housing Benefit change events, although improving, remain above cumulative targets due to earlier delays and case complexity. Land Charges performance dipped following staffing shortages but is now recovering, planning appeals allowed remain above target on a cumulative basis, affordable housing delivery is below target and recycling rates were affected by seasonal reductions in garden waste.

The Council remains committed to further improving its performance and service delivery and actively investing in the development and implementation of automation and self-serve options for customers. By providing accessible and efficient self-help tools, customers can address their queries and concerns independently, leading to a decrease in the need for repeated interactions with services. It will continue to monitor and assess the impact of improvement programs in reducing customer contact and enhancing operational efficiency.

Percentage of Council Tax Collected



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How do we compare?

Benchmarking via Gov.uk Tables and Individual Council Websites using CIPFA Nearest Neighbours – Latest dataset is 2024-25 Collection Rates

2024-25
Benchmark

	%	CIPFA Rank	Quartile
Babergh	99.12	1/16	Top
Tewkesbury	98.53	4/16	Top
Cotswold	98.3	7/16	Second
Maldon	97.95	12/16	Third
Chichester	97.47	16/16	Bottom

Council Tax Collection remained strong in Q3, exceeding the target, with only a small year-on-year decline of 0.39%. The slight decline reflects more households moving to 12-month instalment plans, which lowers mid-year collection.

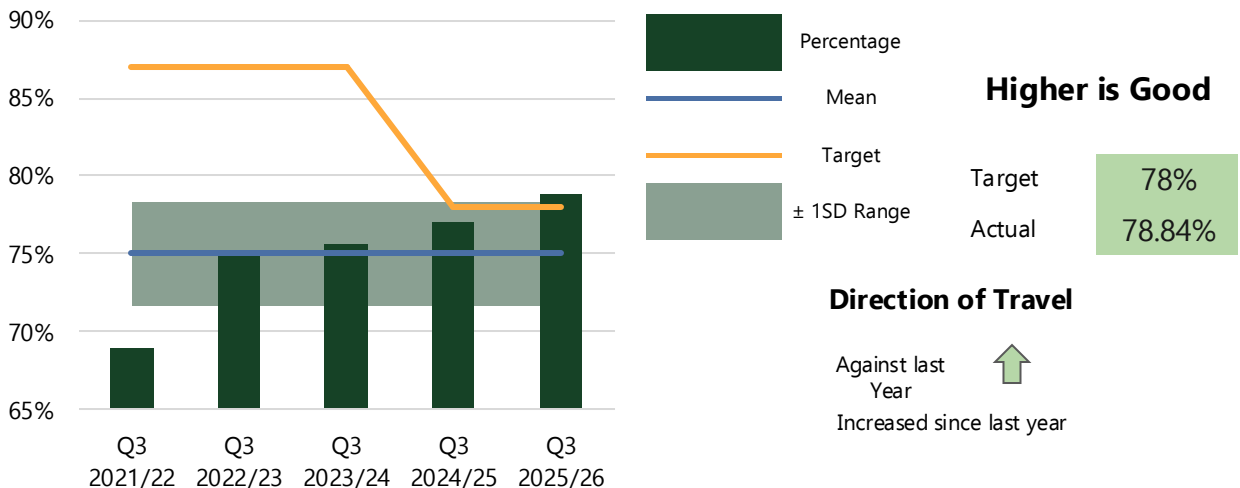
A refreshed Direct Debit campaign is planned to boost uptake and support future performance. Recovery work is fully up to date, and processing times remain steady at around five working days.

The table below shows historic Council Tax collection rates alongside outstanding balances.

	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	Total Outstanding
Balance at Quarter End	£419,228.87	£560,109.85	£611,987.53	£794,807.53	£1,069,550.83	£3,455,684.61
% collected	99.53%	99.36%	99.37%	99.23%	99.01%	



Percentage of Non-domestic rates collected



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How do we compare?

Benchmarking via Gov.uk Tables and Individual Council Websites using CIPFA Nearest Neighbours - Latest dataset is 2024-25 Collection Rates

2024-25 Benchmark	%	CIPFA Rank	Quartile
Mid Devon	99.83	1/16	Top
South Hams	98.3	7/16	Second
Malvern Hills	97.59	11/16	Third
Cotswold	96.91	14/16	Bottom
Stratford-on-Avon	96.46	16/16	Bottom

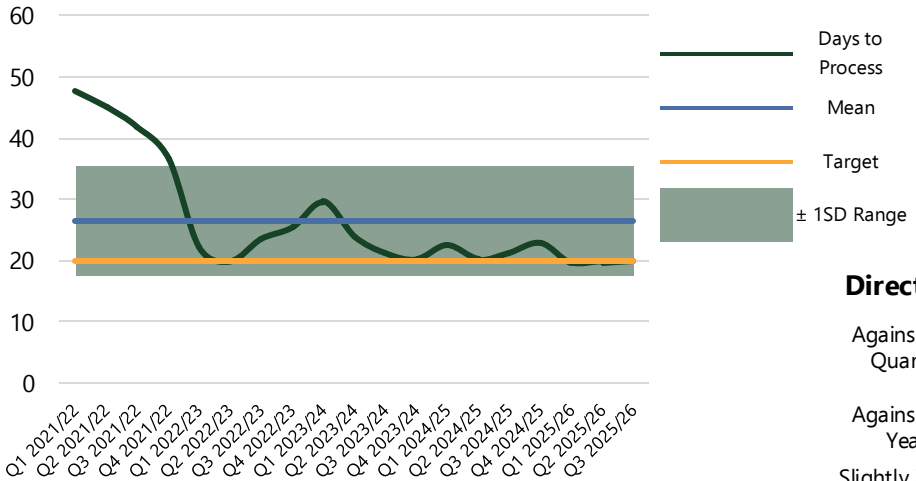
Cotswold collected 78.84% of Business Rates in Q3, up from 77.03% last year and just above its 78% target. Performance has been supported by recent work to keep billing and account updates fully up to date, contributing to the steady year-on-year improvement. Operationally, NDR recovery work remains fully up to date, with processing backlogs stable at around 10 working days.

The table below displays the percentage of Non-Domestic Rates collected in respect of previous years, along with the outstanding amount:

	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	Total Outstanding
Balance at Quarter End	£92,878.46	£218,770.71	£238,102.84	£187,026.36	£418,430.40	£1,155,208.77
% collected	99.41%	99.20%	99.26%	99.49%	98.87%	

Processing times for Council Tax Support new claims


[INDEX](#)




Lower is Good

Target	20
Actual	20.07

Direction of Travel

Against last Quarter 

Against last Year 

Slightly increased since last quarter but decreased since last year

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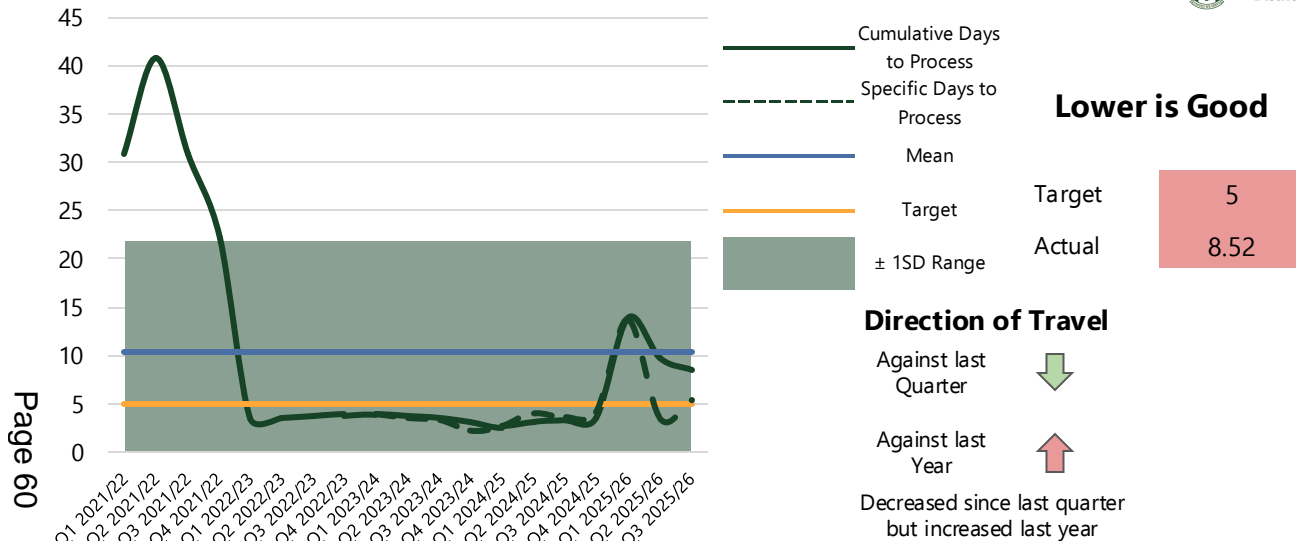
How do we compare?

Gov.uk produces tables to show a snapshot of the number of CTS claimants at the end of each financial year. The below table shows number of claimants at the end of September 2025 and the percentage change from September 2024 for each authority.

Q2 2025-26 Benchmark	Number of Claimants at end of June 2025	Percentage Change since June 2024
Malvern Hills	3,728	-4.29%
Cotswold	3,784	-3.47%
Wychavon	6,580	-1.48%
Tewkesbury	5,003	3.09%

Processing times remained steady in Q3, staying close to target and maintaining overall reliability. The council continued to deliver a series of proactive LIFT-supported campaigns, including outreach on energy support, identifying Universal Credit households not receiving CTS, and promoting Pension Credit and Attendance Allowance. Severe disability checks were completed with no impact on performance. Together, this work reflects a sustained focus on early, targeted support for residents who may be missing out on financial help.

Processing times for Council Tax Support Change Events



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Processing times for Council Tax Support changes continued to improve through Q3, with steady week-on-week reductions strengthening the cumulative position. The Council recorded a cumulative average of just over 8 days, around two days faster than in Q2.

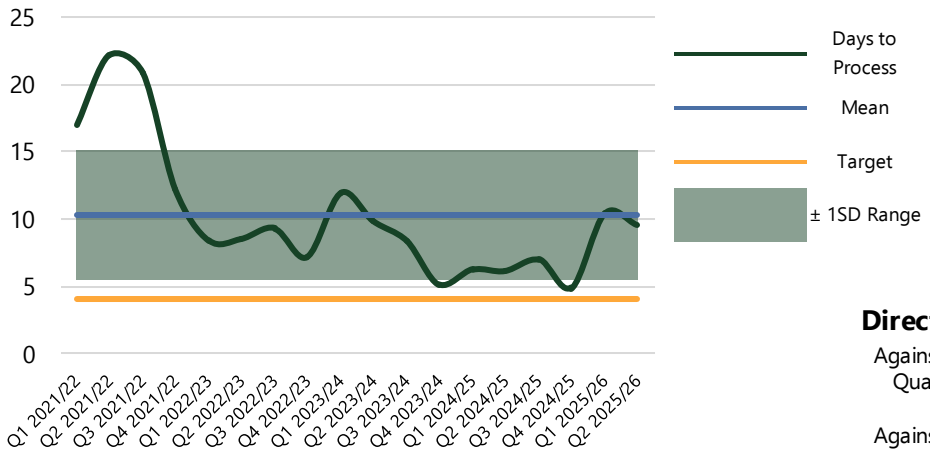
How do we compare?

Benchmarking currently not available. The Data & Performance Team will investigate options.

Although the metric is cumulative, processing times have been consistently reducing by around 0.2 days per week. With automation fully embedded and workflows now optimised, further acceleration is naturally limited, but the current trajectory clearly shows the service is moving in the right direction.



Processing times for Housing Benefit Change of Circumstances



Lower is Good

Target

4

Actual

9.52

Direction of Travel

Against last Quarter



Against last Year



Slightly decreased since last quarter but increased since last year

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How do we compare?

Speed of processing for HB CoCs – LG Inform. Latest dataset is April - June '25 (Q1 2025-26)

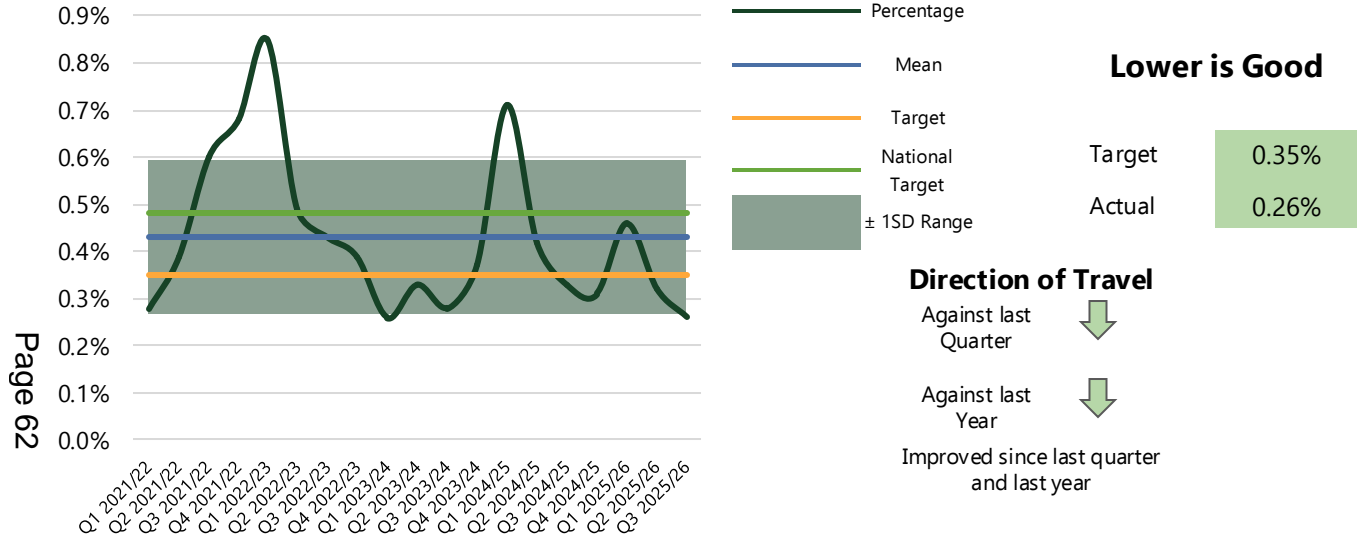
Q1 2025-26 Benchmark

Q1 2025-26 Benchmark	Days	CIPFA Nearest Neighbours Rank	Quartile
Derbyshire Dales	1.91	1/16	Top
Tewkesbury	4.81	3/16	Top
Maldon	5.58	7/16	Second
South Hams	7.51	11/16	Third
West Oxfordshire	8.73	13/16	Bottom
Cotswold	10.69	16/16	Bottom

Processing times for Housing Benefit remained above target in Q3, affected by seasonal workload pressures and delays in receiving full evidence for Change of Circumstances and Full Claim Reviews. The planned pause to Universal Credit activity helped reduce parts of the backlog, and all CFU reviews were completed on time, while the full HBAA Claims Review continues into next year.

Caseload composition is broadly unchanged, with Pension Age, Temporary Accommodation and Supported Accommodation claims still dominating. With fewer change applications being submitted, missing evidence has a greater impact on average processing times. As a larger proportion of HB changes typically arrive in Q4, processing times may improve towards year-end.

Percentage of Housing Benefit overpayment due to LA error/admin delay

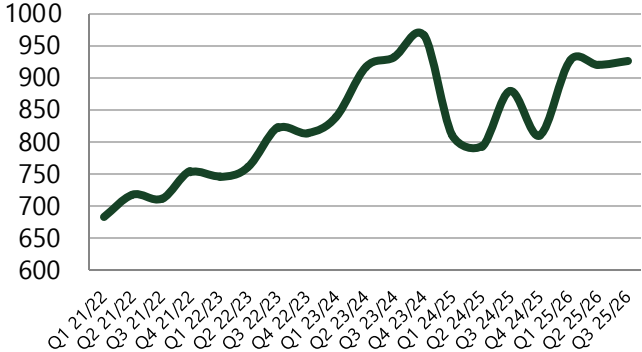


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The Council is currently performing below both the national target of 0.48% and the stricter service target of 0.35%.


How do we compare?
 Benchmarking currently not available. The Data & Performance Team will investigate options.

(Snapshot) Long Term Empty Properties



Direction of Travel

Against last Quarter 

Against last Year 

Decreased since last quarter but increased since last year

Lower is Good

No Target
921

Page 63

How do we compare?

Long Term Vacant Properties within districts - Benchmarking via Gov.uk

<i>2024 Benchmark</i>	Properties	CIPFA Nearest Neighbours Rank	Quartile
West Devon	193	1/16	Top
Tewkesbury	259	3/16	Top
South Hams	354	7/16	Second
Stroud	615	11/16	Third
Cotswold	821	14/16	Bottom
Stratford-on-Avon	1090	16/16	Bottom

During Q2, the Council saw an increase in long-term empty properties in Q3, largely reflecting improvements in reporting systems that have strengthened the accuracy of identifying and monitoring empty homes.

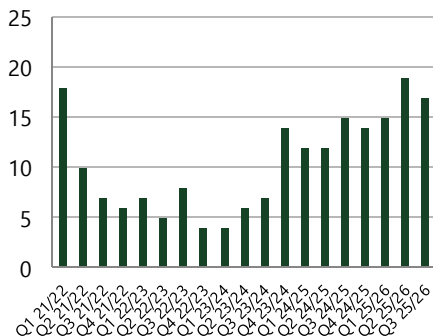
It is also worth noting that the majority of long-term empty properties have been vacant for less than two years, with around 53% falling into this category. If the measure were based only on properties empty for over two years, the figures would reduce significantly to 431 properties.



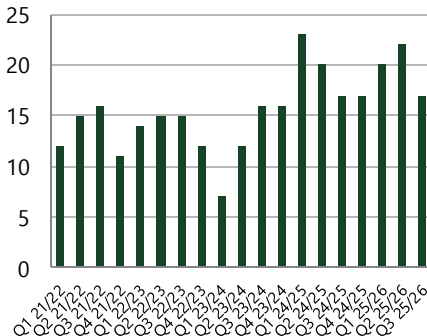
(Snapshot) Number of households in B&B/hotel-type accommodation & Hostels (LA owned or managed); and Number of successful 'Move On' into suitable independent/long-term accommodation from B&Bs/hotels/hostels

Page 64

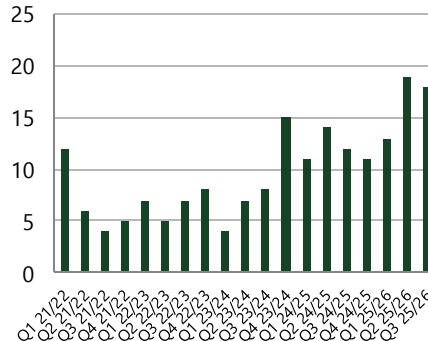
Households in B&B/hotel type accommodation



Households in hostels



Successful 'Move on' into suitable independent/LT accommodation



Direction of Travel

Against Last Quarter	B&Bs/Hotels	↓
Against Last Year	B&Bs/Hotels	↑
Against Last Quarter	Hostels	↓
Against Last Year	Hostels	→
Against Last Quarter	Move Ons	↓
Against Last Year	Move Ons	↑

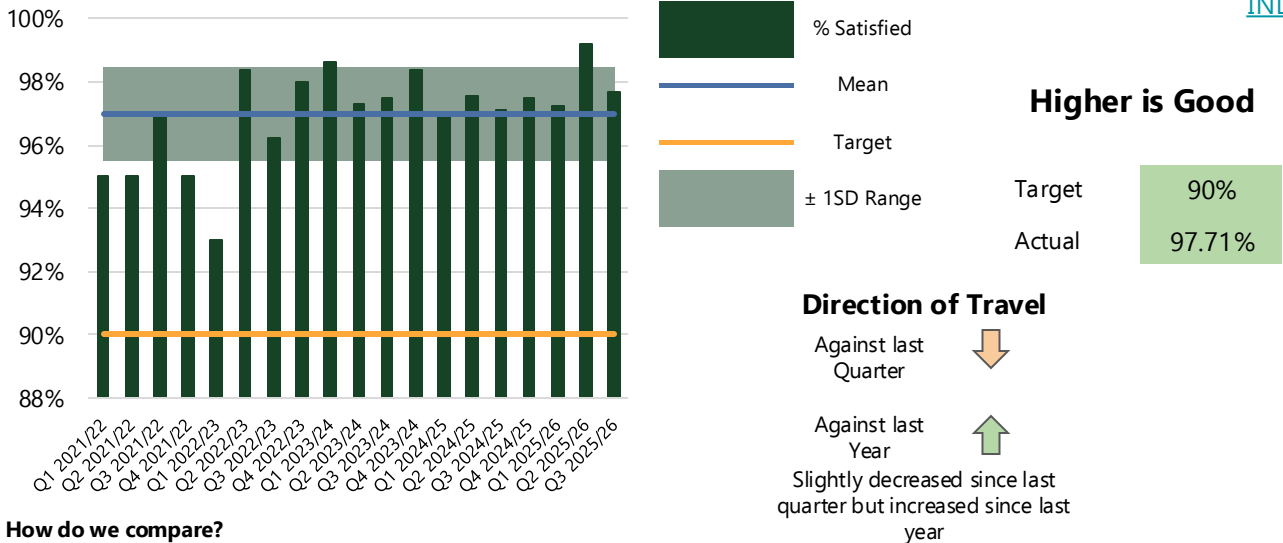
Homelessness continues to be a key priority, and in Cotswold the number of people seeking support has levelled off, suggesting that the council's proactive prevention work is having a sustained, positive impact.

A slight seasonal rise in rough sleeping has been observed, increasing from typically zero or one individual to two or three. This pattern is expected during colder months, when individuals are more likely to engage with council services.

How do we compare?

The Institute for Government has published the Homelessness Performance Tracker, which evaluates the effectiveness of local homelessness services in England by analysing data on demand, funding and outcomes over time. The full report is available [here](#).

Customer Satisfaction - Telephone



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How do we compare?

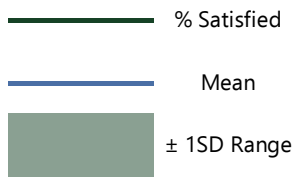
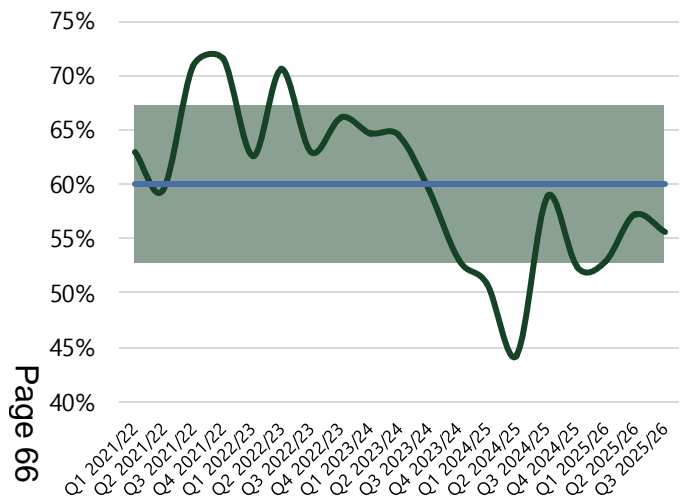
The Govmetric Channel Satisfaction Index is a monthly publication of the top performing councils across the core customer access channels. At least 100 customers need to be transferred to the survey to be included in the league table so even if satisfaction is high, it may not be included.

	July Rank	July Net Sat.	Aug Rank	Aug Net Sat.	Sept. Rank	Sept. Net Sat.
Cotswold	2	98%	2	99%	2	96%
Forest	1	99%	N/A	N/A	1	96%
West	4	92%	1	100%	4	94%

Telephone satisfaction remained consistently high throughout Q3, supported by efforts to encourage survey participation and gather valuable feedback.

A total of 467 residents participated in the survey, of these, 461 customers reported being satisfied with the service, reflecting a high level of overall satisfaction.

Customer Satisfaction - Email





Higher is Good

No Target

55.61%

Direction of Travel

Against last Quarter 

Against last Year 

Slightly decreased since last quarter and last year

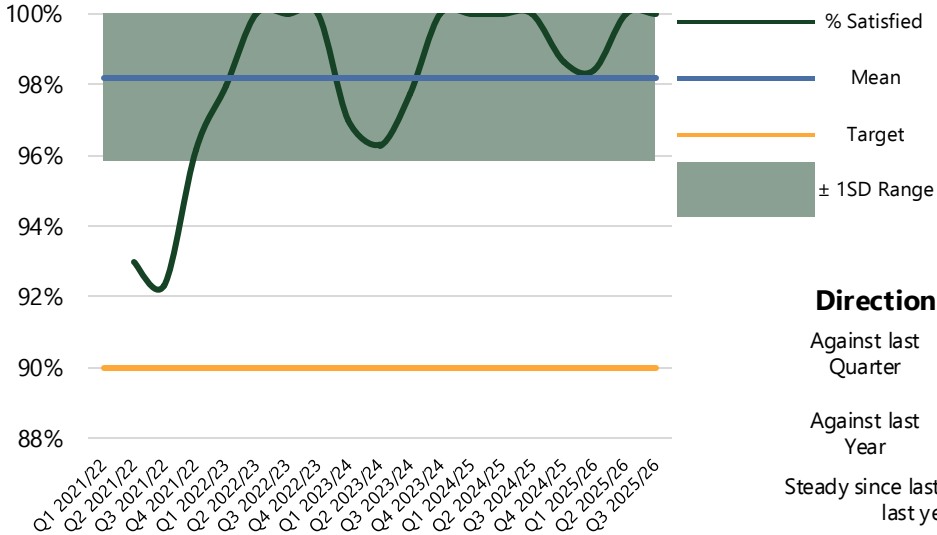
A total of 401 residents participated in the email satisfaction survey, with 223 respondents indicating they were satisfied with the service received. As part of efforts to strengthen customer insight, all customer service emails issued through Salesforce include a built-in survey link, enabling residents to provide feedback quickly and easily.

Following a previous rise in negative feedback, a review was undertaken to identify the underlying causes of dissatisfaction. The analysis highlighted recurring issues such as missed bin collections, delays in container deliveries. The customer service team continues to monitor feedback closely and proactively seeks opportunities to enhance the overall customer experience.

How do we compare?

No benchmarking currently available. The Data & Performance Team will investigate options


Customer Satisfaction - Face to Face




Higher is Good

Target	90%
Actual	100%

Direction of Travel

Against last Quarter 

Against last Year 

Steady since last quarter and last year

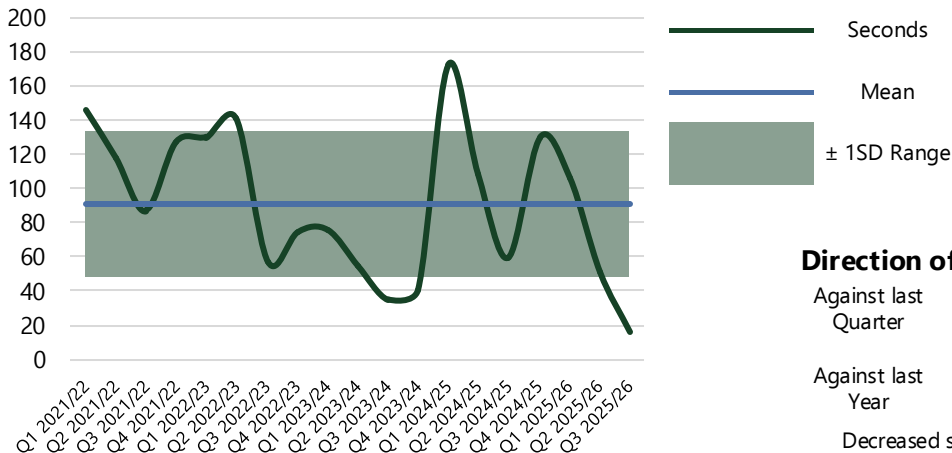
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Customer satisfaction with face-to-face interactions remains consistently strong. This continued performance underlines the value of maintaining accessible in-person services as a key part of delivering a positive and inclusive customer experience.

How do we compare?

No benchmarking currently available. The Data & Performance Team will investigate options

Customer Call Handling - Average Waiting Time





Lower is Good

No Target

16 Seconds

Direction of Travel

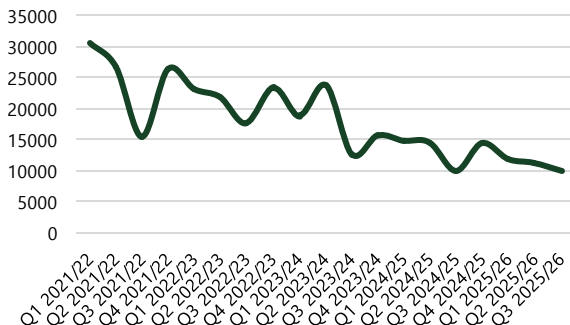
Against last Quarter 

Against last Year 

Decreased since last quarter and last year

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Call Volume Over Time



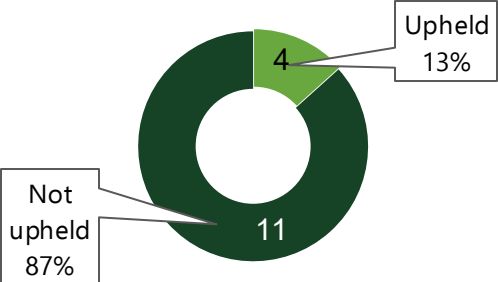
In Q3, average call waiting times in Cotswold improved by roughly 45 seconds compared with the same period last year. The longer waits experienced last year were largely due to high staff turnover and a shortage of experienced advisors. With the service now fully staffed, performance has remained strong, even though sickness levels have been higher this quarter.

Regular training and refresher sessions have helped ensure advisors remain confident and consistent, supporting service continuity during periods of annual leave and sickness. Call volumes in Cotswold remain broadly in line with last year, and the seasonal lull typical of Q3 has contributed to smoother operations and more stable demand.

How do we compare?


SPARSE are investigating pulling together Customer Services benchmarking data and if there is sufficient demand and suitably similar metrics to provide comparison across similarly rural local authorities we will work with them to assess any crossover in metrics and potential presentation.


Complaints by Status



Direction of Travel

Complaints upheld or partly upheld at Stage 1

Against last Quarter 

Against last Year 

Steady since last quarter but slightly increased since last year

Page 09

How do we compare?

The table outlines the complaints received by the Ombudsman over the period, the decisions made on these cases, and the Council's compliance with any recommendations issued by the Ombudsman during this time. Complaints received by the Ombudsman reflect cases where customers, having completed the Council's complaint process (see to the right), feel that the Council has not satisfactorily resolved the matter.

See the table on the following page for a breakdown of those upheld and partially upheld.

A new Customer Feedback Procedure went live on the 1st April 2025.

The new process has the following stages:

- Stage 1: A review of the complaint will be undertaken by an Operational Manager within the Service Area to which the complaint relates. A response needs to provide within 10 working days from the date that we advised that the complaint was valid.
- Stage 2: Requests for Stage 2 will be acknowledged and logged within five working days of the escalation request being received. Upon receipt of a Stage 2 request, an investigation into the complaint will be undertaken by the Complaint Officer or a member of the Complaints Team. A response will be provided to the customer within 20 working days from receipt of the request to escalate the complaint to Stage 2. Stage 2 is the organisation's final response; the complainant can then refer their complaint to the LGO.

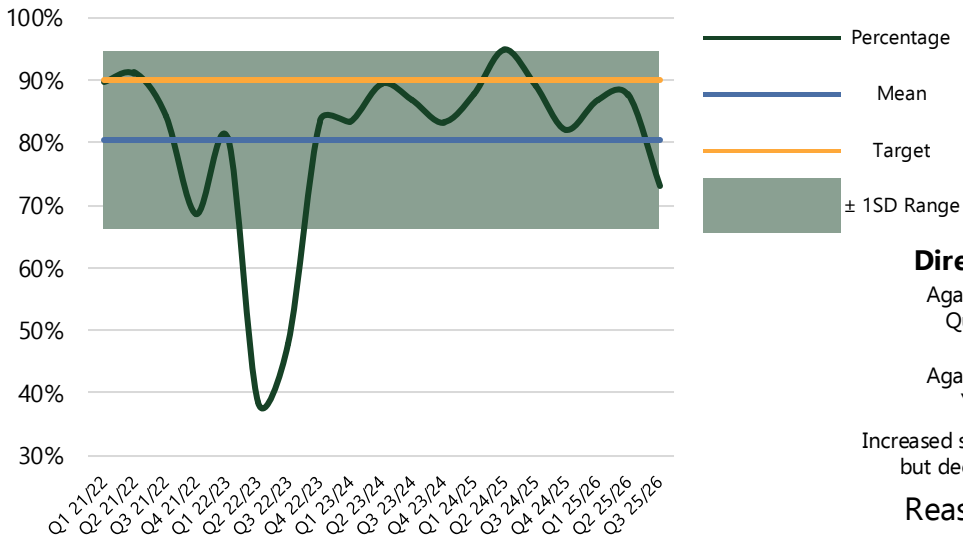
2024-25

	Complaints Investigated	Percentage Upheld	Upheld decisions per 100,000 residents	Percentage Compliance with Recommendations	Percentage Satisfactorily Remedy	CIPFA Rank	Quartile
Cotswold	1	0%	0	N/A	N/A	1/13	Top
Stroud	1	100%	0.8	100%	0%	4/13	Second
Chichester	2	100%	1.6	100%	0%	9/13	Third
South Hams	2	100%	2.2	100%	50%	13/13	Bottom

Complaints Upheld or Partially Upheld Breakdown

Service area	Description	Outcome/learning	Decision	Response time (days)
Revenues & Benefits	A long-standing Single Person Discount was missed for around 15 years, leading to an overcharge. This occurred because the property's change from second-home status to main residence was not updated.	A refund was issued and an apology provided.	Upheld	10
Page 70 Revenues & Benefits	A provisional council tax banding was not reviewed before the resident moved out. Although the account had been settled at the time, the charge was later increased once the banding was corrected.	The additional charge was withdrawn due to a lack of contact.	Upheld	10

Percentage of FOI requests answered within 20 days



Higher is Good

Target	90%
Actual	73.17%

Direction of Travel

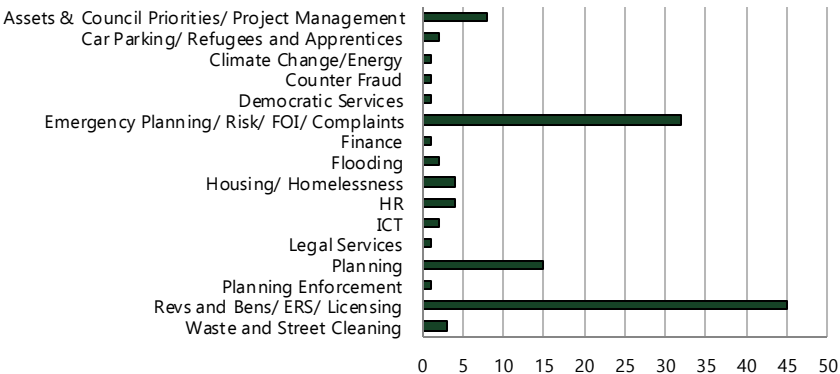
Against last Quarter

Against last Year

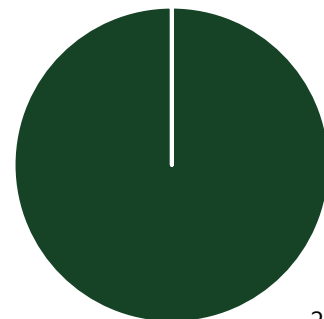
Increased slightly since last quarter but declined since last year

Reasons for Delays in Responding to FOI Requests Beyond the 20-Day Deadline

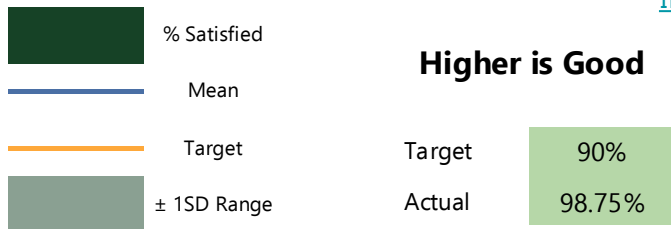
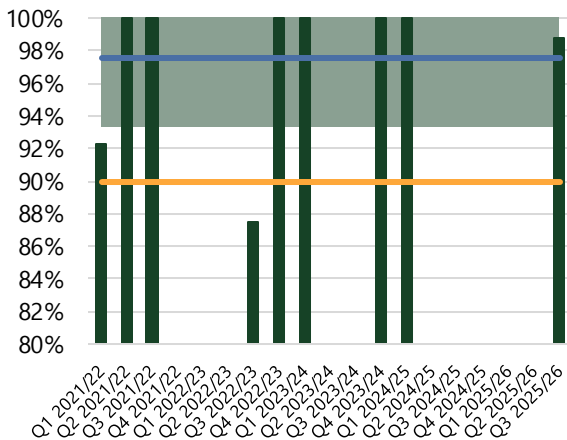
Requests by Service Area



■ Service Area not provided Information in time



Building Control Satisfaction



Direction of Travel

Against last Quarter: N/A
Against last Year: N/A

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A new customer-feedback webform was introduced in October and issued with completion certificates. Early responses have been very positive, with customers commending the team’s knowledgeable support, friendly guidance, and efficient, responsive service.

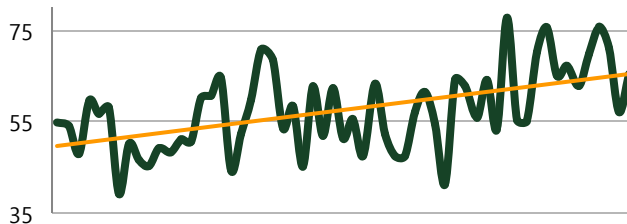
In Q3, the market share averaged 64%, with 110 applications processed, reflecting a 6% increase in market share compared to the same period last year. However, application volumes remained steady, with only a slight year-on-year decrease of 2.

The below chart shows market share over time from April 2021

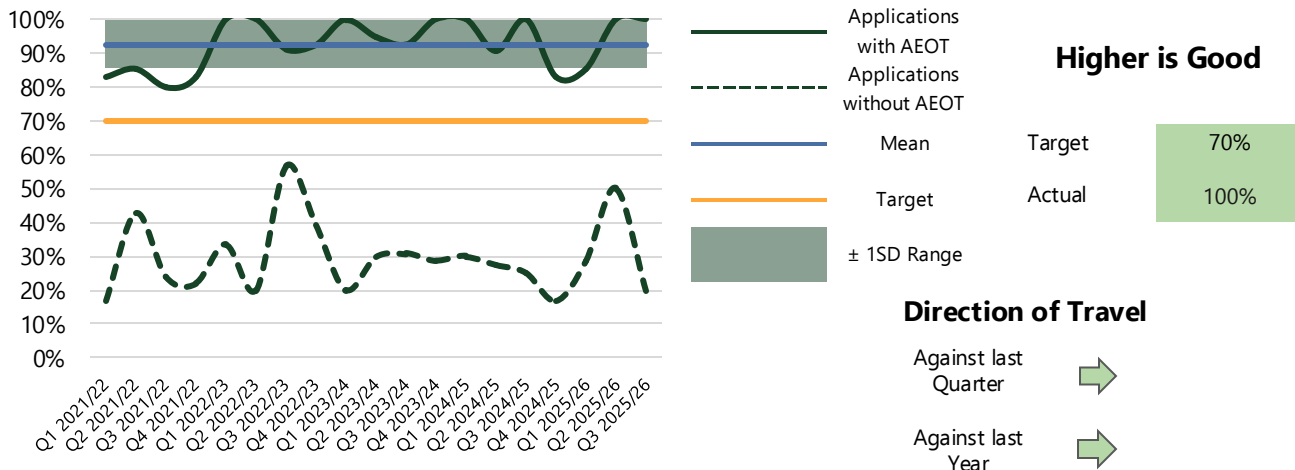
How do we compare?

Percentage of share in the market

October	November	December	Number of Apps for Quarter
71%	57%	66%	110



Percentage of major planning applications determined within agreed timescales (including Agreed Extensions of Time (AEOT))



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How do we compare?

Major Developments - % within 13 weeks or agreed time – LG Inform. Latest dataset is July - September '25 (Q2 2025-26)

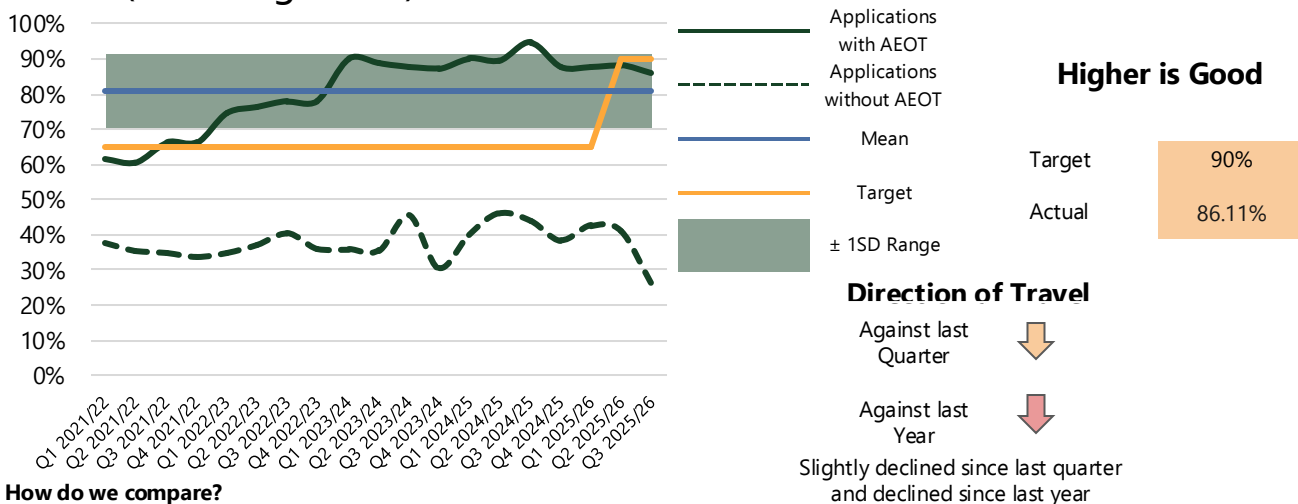
Q2 25-26 Benchmark	%	CIPFA Rank	Quartile
Cotswold	100	Joint - 1/16	Top
Babergh	100	Joint - 1/16	Top
Stratford-on-Avon	94	11/16	Third
Maldon	80	13/16	Bottom
Wychavon	79	15/16	Bottom
Derbyshire Dales	75	16/16	Bottom

The service has maintained strong performance in processing Major applications within the agreed timeframes.

During Q3, ten major applications were determined.

[See slide for Minor Developments for further narrative](#)

Percentage of minor planning applications determined within agreed timescales (including AEOT)



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How do we compare?

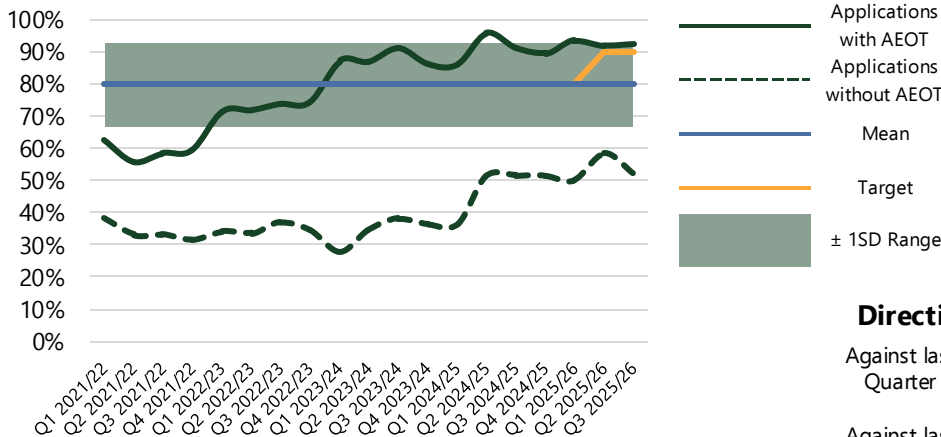
Minor Developments - % within 8 weeks or agreed time – LG Inform. Latest dataset is July - September '25 (Q2 2025-26)

Q2 25-26
Benchmark

Q2 25-26 Benchmark	%	CIPFA Rank	Quartile
West Oxfordshire	98	1/16	Top
Mid Devon	95	3/16	Top
Malvern Hills	92	6/16	Second
Cotswold	88	9/16	Third
Maldon	81	13/16	Bottom
Tewkesbury	75	16/16	Bottom

This quarter, the Council maintained strong performance in processing minor planning applications within statutory timeframes. However, results fell slightly short of the newly introduced 90% service target, which was implemented following recommendations in the Planning Advisory Service (PAS) report. The Planning team continues to make steady progress with key priorities include the staffing restructure, improvements to enforcement, and a review of pre-application services. Among the sub-actions, the new negotiation protocol has been completed and fully implemented. A new PPA strategy is underway, with a draft template already produced. Additionally, revised fees and charges were agreed by Cabinet in January.

Percentage of other planning applications determined within agreed timescales (including AEOT)



Higher is Good

Target 90%
Actual 92.16%

Direction of Travel

Against last Quarter

Against last Year

Slightly increased since last quarter and increased since last year

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How do we compare?

Other Developments - % within 8 weeks or agreed time - LG Inform. Latest dataset is July - September '25 (Q2 2025-26)

Q2 25-26 Benchmark	%	CIPFA Rank	Quartile
Chichester	100	1/16	Top
Babergh	97	3/16	Top
Tewkesbury	96	5/16	Second
Malvern Hills	93	11/16	Third
Cotswold	92	13/16	Bottom
Derbyshire Dales	70	16/16	Bottom

The Council has performed very well in processing Other applications within agreed timeframes.

In Q3, a total of 204 Other applications were determined.

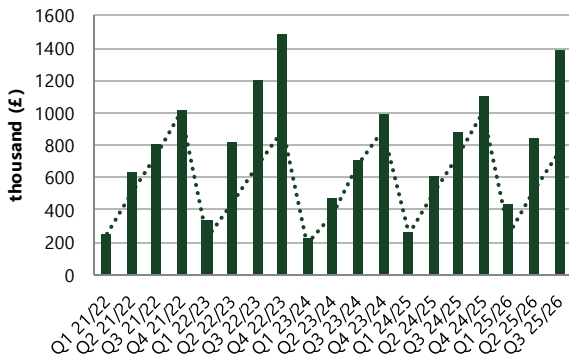
As of the end of the quarter, the Council's rolling average stands at 89.98%, significantly above the government's 70% threshold for non-major applications. This reflects the service's robust and consistent performance over the past year.

[See slide for Minor Developments for additional narrative](#)

Total Income achieved in Planning & Income from Pre-application advice

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Total planning income



Direction of Travel


Total Planning Income

Against last Quarter 

Against last Year 

Pre-Application Income

Against last Quarter 

Against last Year 

Higher is Good

Total Planning Income (£)

Target 762,371

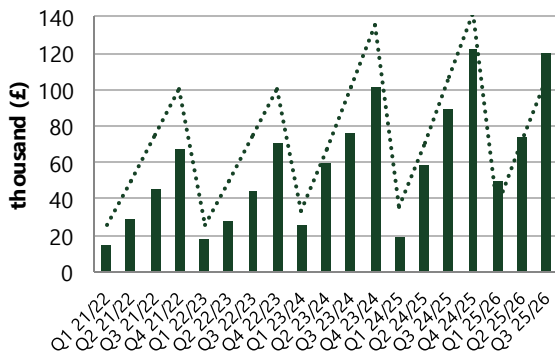
Actual 1,386,761

Pre-Application Income (£)

Target 106,500

Actual 119,892

Pre-application income



Total Income – Increased since last quarter and last year

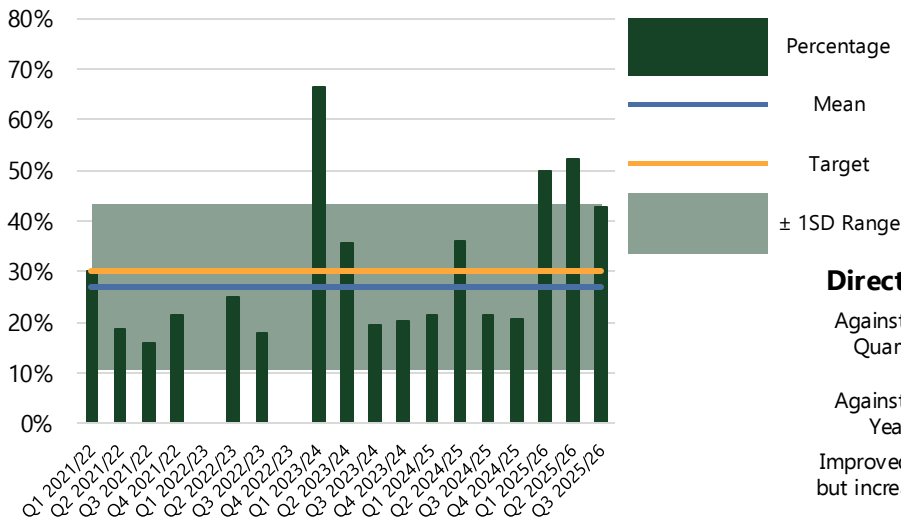
Pre-App Income – Increased since last quarter and last year

The Council maintained a steady flow of major applications and sustained pre-application interest, reflecting ongoing developer confidence and active site promotion. Major applications accounted for around 50% of total income for Q3, underlining their significant contribution to the service. Additionally, pre-application income exceeded targets, further reinforcing the sustained interest in development opportunities across the district and suggesting continued confidence in the area's growth potential.

How do we compare?

Planning Advisory Service (PAS) planned to benchmark back in 2021. No data is available in the public domain.


Percentage of Planning Appeals Allowed (cumulative)




Lower is Good

Target	30%
Actual	42.65%

Direction of Travel

Against last Quarter 

Against last Year 

Improved since last quarter but increased since last year

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How do we compare?

Percentage of planning appeals allowed (Specifically Q2 2025-26)

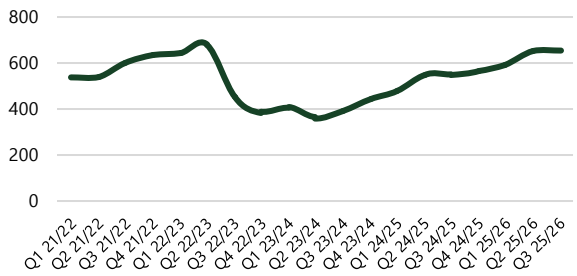
Q1 25-26 Benchmark	%	CIPFA Rank	Quartile
Mid Devon	0	1/16	Top
Stroud	8	4/16	Top
Tewkesbury	33	8/16	Second
Malvern Hills	36	10/16	Third
Chichester	45	13/16	Bottom
Cotswold	50	16/16	Bottom

This indicator aims to ensure that no more than 30% of planning appeals are allowed in favor of the applicant, with a lower percentage being more favorable. According to the latest statistics from the Planning Inspectorate, the national average for Section 78 planning appeals granted is 28% (source: [gov.uk](https://www.gov.uk)).



Between 1 October and 31 December 2025, ten appeals were decided, with two allowed in favour of the applicant, resulting in a 20% allowance rate for the quarter.

(Snapshot) Planning Enforcement Cases

Open Cases at end of Quarter over Time



Direction of Travel for Open Cases at end of Quarter

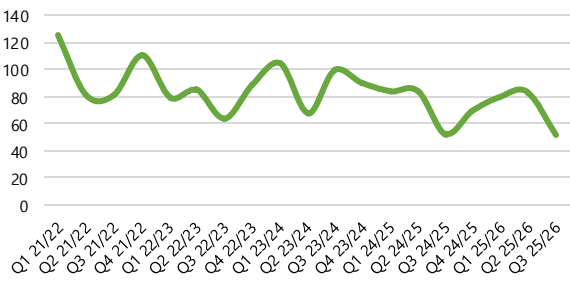
- Against last Quarter 
- Against last Year 

Lower is Good

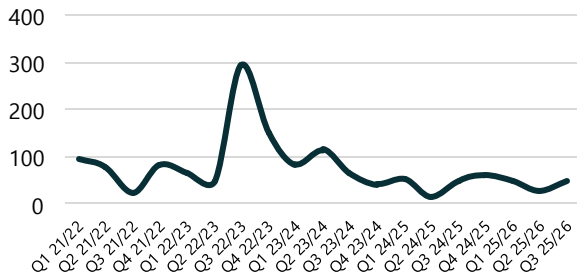
No Target
Open Cases at End of Quarter 650

Number of Cases Opened During the Quarter over Time

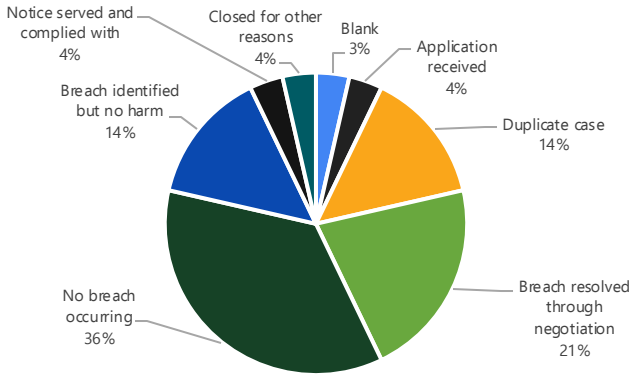
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Number of Cases Closed During the Quarter over Time

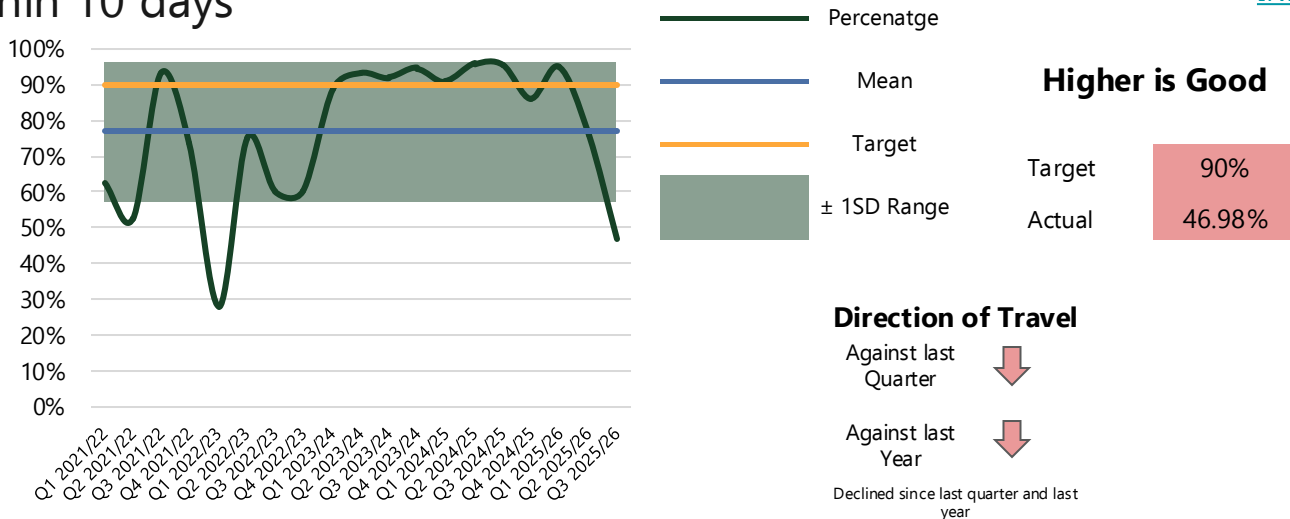


Reasons for Closure



The Enforcement team has made steady progress this quarter. A new Enforcement Plan has been drafted and is now with managers for review. Staffing levels are improving, with two positions filled and recruitment ongoing for senior roles. The Transformation team is mapping key processes to identify quick wins and support a more streamlined service. This combined work is helping to strengthen capacity and improve the team's overall resilience.

Percentage of official land charge searches completed within 10 days



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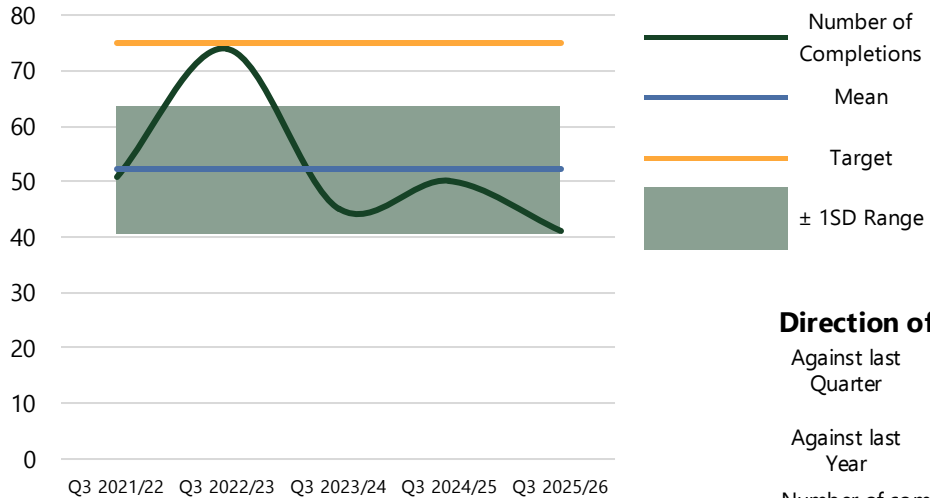
During Q3, the Council experienced a decline, dropping to 46.98% from Q2's 76.07%. This was primarily due to the loss of a member of the Land Charges team in September, which created a significant backlog at a time when search volumes remained steady. This was driven by the loss of a team member in September, which created a backlog at a time when search volumes remained steady. Additional administrative support from Customer Services and the Support Services Team has since helped stabilise the service by allowing specialist officers to focus on clearing older cases and managing workflow more effectively. Following the sharp downturn in September, Cotswold has shown a clear and sustained recovery. Performance rose from 17% in September to 72% in December, indicating that service levels are steadily returning toward expected standards.

How do we compare?

No benchmarking currently available. The Data & Performance Team will investigate options

Number of affordable homes delivered (cumulative)

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Higher is Good

Target	75
Actual	41

Direction of Travel

Against last Quarter

Against last Year

Number of completions increased since last quarter but declined since last year

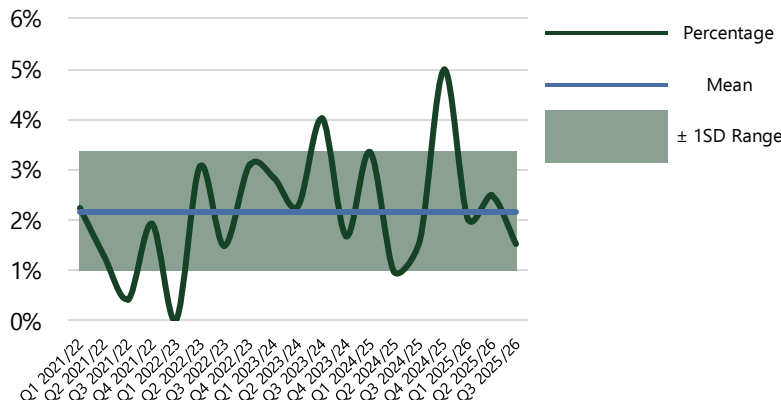
During Q3, twenty-one affordable homes were delivered. This included 6 homes by Sanctuary in Down Ampney and 15 homes by Cotswold Housing Association in Moreton-in-Marsh. Projections from Registered Providers indicate 70 completions for 2025/26, which is below the target of 100, making it unlikely the district will meet its annual goal. Delivery levels often fluctuate due to long build times and multi-year development phases, and early over-delivery under the current strategy has contributed to lower levels in more recent periods.

How do we compare?

No benchmarking currently available. The Data & Performance Team will investigate options

Number of fly tips collected and percentage that result in an enforcement action

(defined as a warning letter, fixed penalty notice, simple caution or prosecution)



Direction of Travel

Number of Fly Tips

Against last Quarter → *No Target*
 Against last Year → Number of Fly Tips Collected

147

Percentage Enforcement Action

Against last Quarter ↓ Percentage Enforcement Action
 Against last Year → 1.53%

Fly Tips – Steady since last quarter but slightly increased since last year

Enforcement Action – Slightly declined since last quarter but steady since last year

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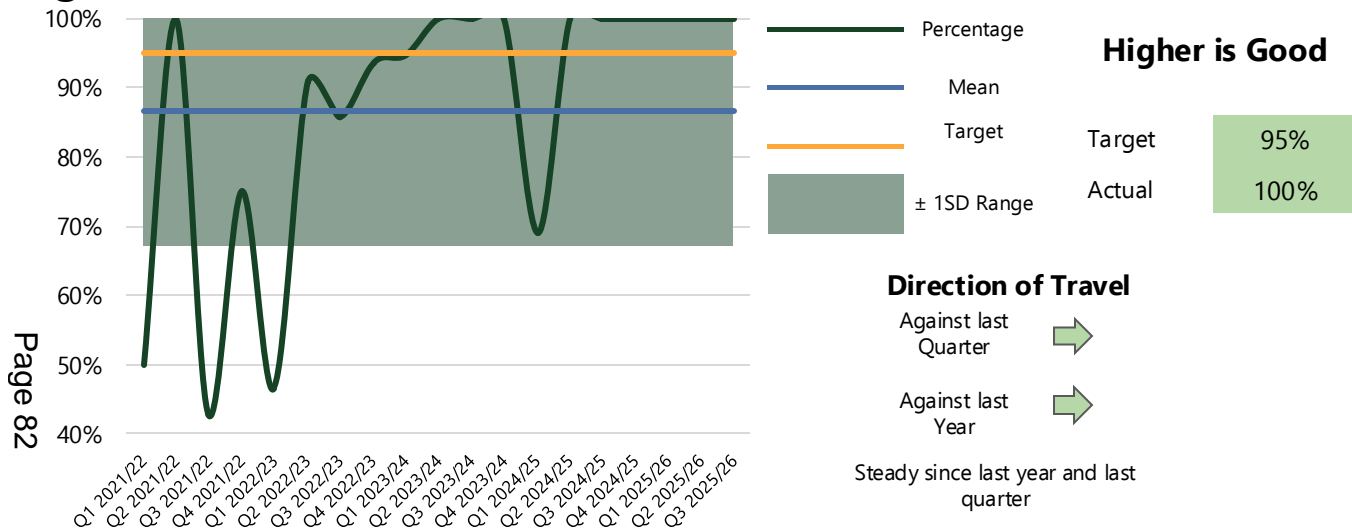
How do we compare?

Number of Fly Tips reported for year 2022-23 for Local Authorities in England – Gov.uk. The latest dataset available is 2023-24

2023-24 Benchmark	Total Fly Tips	Total FPNs	% FPNs per Fly Tip	CIPFA Nearest Neighbours Rank	Quartile
Maldon	364	13	3.57	1/16	Top
Cotswold	972	12	1.23	6/16	Second
Wychavon	835	3	0.36	10/12	Third
West Devon	346	0	0	16/16	Bottom

During Q3, the team delivered a joint stop-and-search with Police and Trading Standards at Aston Down, engaging 43 vehicles. A new initiative secured court approval for directed surveillance following large-scale cannabis fly-tipping. Public engagement included a BBC TV feature on Duty of Care, while enforcement actions resulted in warning letters, FPNs and case files for prosecution. Additionally, a vehicle linked to fly-tipping has been flagged for police seizure to strengthen deterrence.

Percentage of high risk food premises inspected within target timescales



Page 82

The Council conducted eight inspections during Q3, all of which were completed within the timescale.

High-risk food inspections are prioritised due to their greater potential impact on public health and safety enabling issues to be addressed swiftly. However, this focus can occasionally delay scheduled inspections for lower-risk food businesses. To mitigate this, the service uses a dashboard to track both high- and lower-risk inspections, ensuring that, despite the emphasis on high-risk establishments, lower-risk inspections are still completed promptly to maintain overall compliance and safety standards.

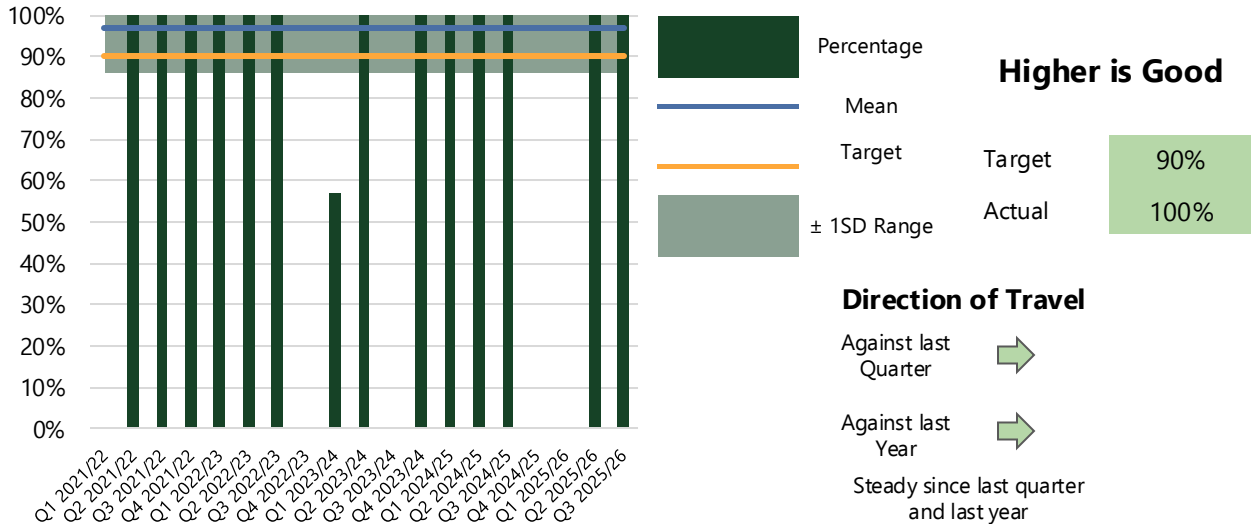
How do we compare?

No benchmarking currently available. The Data & Performance Team will investigate options

% High risk notifications risk assessed within 1 working day

(including food poisoning outbreaks, anti-social behaviour, contaminated private water supplies, workplace fatalities or multiple serious injuries)

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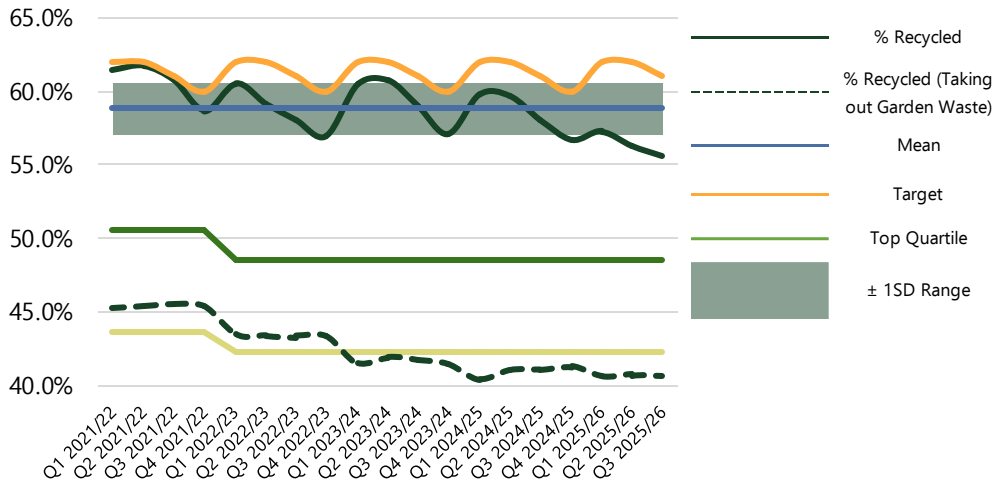


Three high-risk notification was received during Q3 relating to a sewage leak, which was assessed within the target timescale.

How do we compare?

No benchmarking currently available. The Data & Performance Team will investigate options


Percentage of household waste recycled




Higher is Good

Target **61%**
Actual **55.64%**

Direction of Travel

Against last Quarter 

Against last Year 

Declined since last quarter and last year

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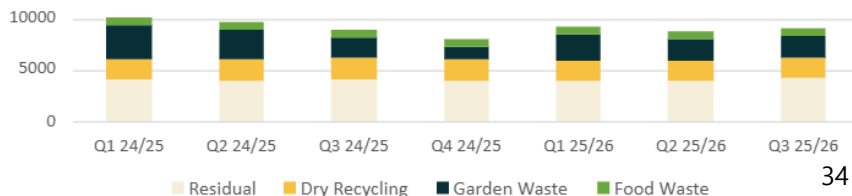
How do we compare?

Percentage of household waste sent for reuse, recycling or composting – Gov.uk

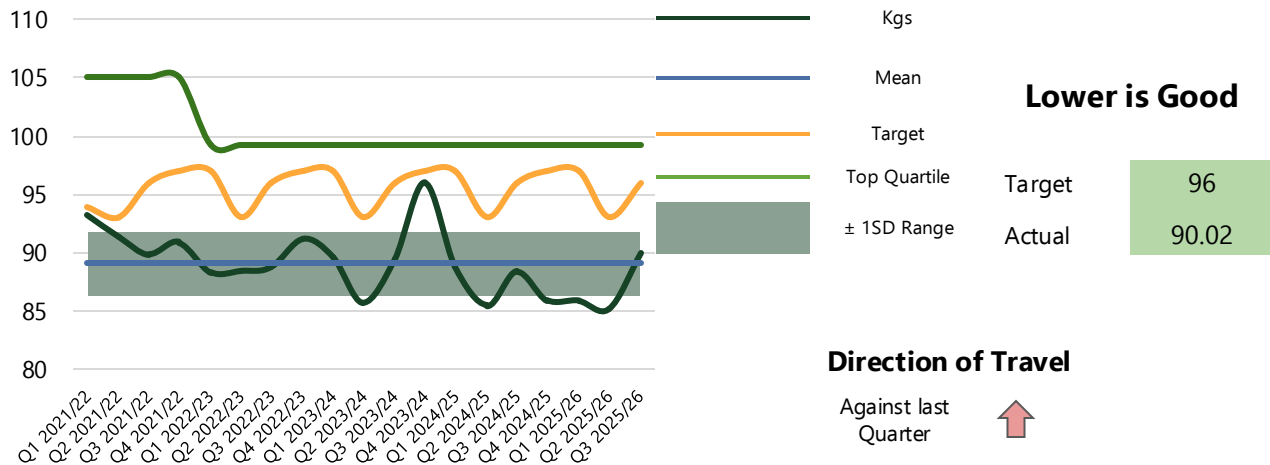
2023-24 Benchmark	%	CIPFA Rank	Quartile
Stratford-on-Avon	61	1/16	Top
Maldon	57.2	3/16	Top
Cotswold	57.1	5/16	Second
South Hams	46.6	10/16	Third
Lichfield	45.1	13/16	Bottom
East Hampshire	34.5	16/16	Bottom

The Council's recycling rate declined by around 2.5% compared to the same period last year, reflecting a wider national trend. In 2023/24, household recycling rates across England varied widely, ranging from 15.8% to 62.9% among local authorities. The national average recycling rate rose slightly to 42.3%, marking a 0.6 percentage point increase from the previous year.

Tonnage Collected by Waste Stream



Residual Household Waste per Household (kg)



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How do we compare?

Residual household waste per household (kg/household) – Gov.uk. The latest dataset available in 2023-2024

2023-24 Benchmark	Kg	CIPFA Rank	Quartile
Stroud	298.6	1/16	Top
Stratford-on-Avon	320.0	4/16	Top
Maldon	350.2	8/16	Second
Cotswold	358.0	9/16	Third
Wychavon	436.5	13/16	Bottom
Babergh	461.4	16/16	Bottom

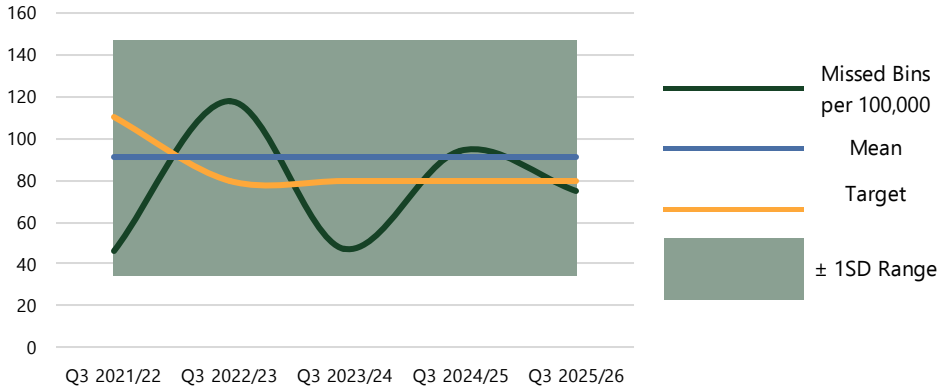
Residual household waste levels typically follow seasonal patterns, and targets are set accordingly.

In Q3, the Councils remained below their residual waste targets and also outperformed the Shire Districts' median of 111 kg per household. They also ranked within the top quartile of English District Local Authorities, with residual waste levels below the 99.25 kg threshold.

This continued strong performance highlights the Councils' effective waste reduction efforts and their position as national leaders in managing household waste.

Missed bins per 100,000


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Lower is Good

Target	80
Actual	75

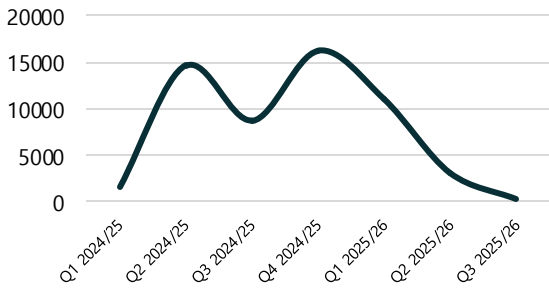
Direction of Travel

Against last Quarter 

Against last Year 

Increased since last quarter but decreased since last year

Household Service Failures



Unique Instances of Households being Affected by Service Failures This Quarter

271

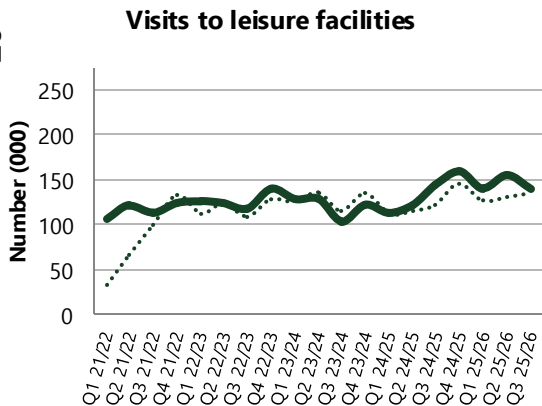
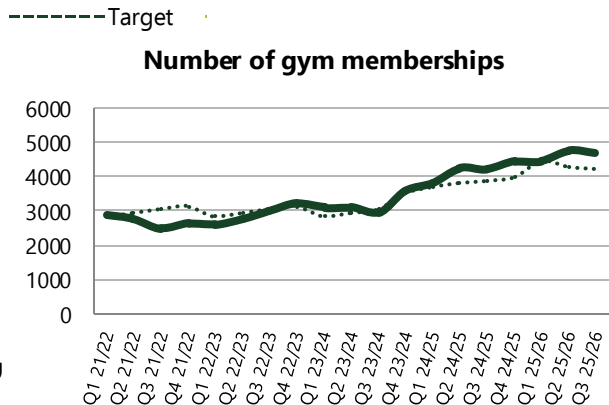
Missed bins per 100,000 collections rose to 75 during Q3, remaining below the target of 80. During the quarter, staff and process changes, along with improved communication through memos and toolbox talks, helped reinforce the importance of returning to missed collections. The ageing fleet also contributed to a number of breakdowns, which impacted service reliability; however, Cabinet have approved a new waste fleet replacement strategy to address this.

How do we compare?

Missed collections per 100,000 collections (full year) - APSE

2022-23 Benchmark	Missed collections per 100,000 collections	Family Group Rank	Family Group Quartile	Whole Service Rank	Whole Service Quartile
Cotswold	109.89	12/14	Bottom	39/45	Bottom

Number of visits to the leisure centres & (Snapshot) Number of gym memberships




Direction of Travel Gym Memberships

Against last Quarter 

Against last Year 

Leisure Visits

Against last Quarter 

Against last Year 

Higher is Good

Gym Memberships

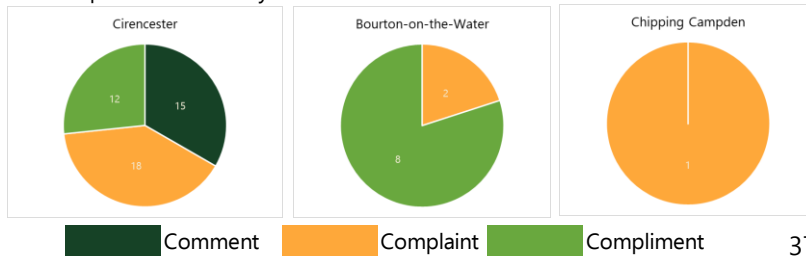
Target 4,250
Actual 4,693

Leisure Visits

Target 135,595
Actual 140,485

Gym Memberships – Increased since last quarter and last year
Leisure Visits – Increased since last quarter and last year

The Council exceeded its leisure targets in Q3, with memberships 10% above target and visits 4% above target, reflecting strong usage and demand for its facilities. A renewed focus on engagement this quarter has driven encouraging improvements in participation. To build on this momentum, several “Meet the Manager” sessions were held in October, successfully gathering member feedback and supporting service development. Recruitment has also progressed well, with a new support officer appointed and in post from January.



How do we compare?

The Data Team are currently working with partners to compile the data return for APSE performance networks which will then provide benchmarking for this metric.

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Council name	COTSWOLD DISTRICT COUNCIL
Name and date of Committee	CABINET – 16 APRIL 2026
Subject	FINANCIAL PERFORMANCE REPORT – Q3 2025/26
Wards affected	All
Accountable member	Cllr Patrick Coleman, Cabinet Member for Finance Email: patrick.coleman@cotswold.gov.uk
Accountable officer	David Stanley, Deputy Chief Executive and Section 151 Officer Email: david.stanley@cotswold.gov.uk
Report author	Michelle Burge, Chief Accountant and Deputy Section 151 Officer Email: michelle.burge@cotswold.gov.uk
Summary/Purpose	This report sets out the third quarterly budget monitoring position for the 2025/26 financial year.
Annexes	Annex A – Capital Programme Outturn Forecast Annex B – Non-Treasury Management Prudential Indicators
Recommendation(s)	That Cabinet resolves to: 1. Review and note the financial position set out in this report.
Corporate priorities	<ul style="list-style-type: none"> Delivering Good Services
Key Decision	YES
Exempt	NO
Consultees/ Consultation	None



1. BACKGROUND

- 1.1** This report presents to members the third quarterly outturn forecast and monitoring position statement for the 2025/26 financial year.
- 1.2** The purpose of this report is to notify members of any significant variations to budgets, highlight any key financial issues, and to inform members of options and further action to be taken.

2. EXECUTIVE SUMMARY

- 2.1** This report sets out the outturn forecast for the financial year informed by Q3 budget monitoring. Overview and Scrutiny Committee considered this report at their meeting on 13 April 2026.
- 2.2** Based on the Q3 budget monitoring exercise and an assessment of the risks and uncertainties facing the Council, the forecast outturn shows a positive variation of £0.045m, reflecting a £0.029m increase from the £0.016m forecast reported at Q2, this continues to reflect the Council's strategy to utilise the enhanced financial position this year to reduce financial pressures in future years. The forecast outturn includes proposed transfers of several forecast underspends, as outlined in section 4.12 and 4.35 below, providing an opportunity to strengthen financial sustainability over the Medium-Term Financial Strategy (MTFS) period.
- 2.3** The forecast outturn also assumes that **100% of planning income more than budget** will be transferred to the Planning Appeals Reserve, as set out in the Q2 budget monitoring report. In addition, **£0.165m of car park income in excess of budget** is allocated to fund the replacement of pay-and-display machines within the Council's 2026/2027 Capital Programme, thereby maximising internal resources available for capital expenditure.



Table ES1 – Revenue Budget Outturn Forecast (Q3)

	2025/26 Latest Net Budget (£'000)	2025/26 Profiled Budget to Q3 (£'000)	2025/26 Actuals to Q3 (£'000)	2025/26 Outturn Forecast (£'000)	2025/26 Outturn Variance (£'000)
Revenue Budget					
Subtotal Services	19,291	11,689	10,456	17,935	(1,356)
Less: Reversal of accounting adjustments	(1,925)		0	(1,925)	0
Revised Subtotal Services	17,366	11,689	10,456	16,010	(1,356)
Corporate Income & Expenditure	(1,663)	(529)	(986)	(171)	1,491
Provisions and Risk Items	0	0	0	0	0
Net Budget Requirement	15,704	11,160	9,469	15,839	136
Funded by:					
Council Tax	(7,065)	0	0	(7,065)	0
Retained Business Rates	(5,117)	6,342	6,344	(5,117)	0
Government Funding - Grants	(2,527)	(1,896)	(1,898)	(2,527)	0
Government Funding - NHB	(820)	(615)	(615)	(820)	0
Extended Producer Responsibility (EPR)	(1,502)	(1,127)	(1,261)	(1,683)	(181)
Collection Fund (surplus) / Deficit	689	0	0	689	0
TOTAL Funding	(16,342)	2,705	2,570	(16,523)	(181)
Budget shortfall/(surplus)	(638)	13,865	12,039	(684)	(45)



Table ES2 – Revenue Budget – Reconciliation of variations (Q3)

Variations at a glance	Positive variation (£'000)	Adverse Variation (£'000)	Net Variation (£'000)	Q2 Outturn Variance (£'000)	Movement from Q2 (£'000)
Service Variations					
Fees & Charges - Cemeteries		39	39	34	5
Fees & Charges - Licensing	(30)		(30)	(30)	0
Fees & Charges - Building Control	(44)		(44)	(49)	5
Fees & Charges - Bulky Waste	(31)		(31)	(20)	(11)
Fees & Charges - Environmental Protection		15	15		15
Fees & Chages - Land Charges	(29)		(29)		(29)
Trinity Road - Utilities	(21)		(21)	(37)	16
Car Park fees, permits and penalty charges	(256)	0	(256)	(174)	(82)
Car park expenditure	(24)		(24)	(26)	2
Commercial Property - Rental income shortfall (risk)		64	64	64	0
Tenant Area of Trinity Road	(20)		(20)	(20)	0
Development Management Fees	(674)		(674)	(400)	(274)
Recycling - Minor Contracts	(30)		(30)	(30)	0
Recycling - Income	(33)		(33)	0	(33)
Card payment processing charges		5	5	20	(15)
Net Homeless Expenditure (Flexible Homeless Grant higher than budgeted)	(70)		(70)	(45)	(25)
Postage and Printing		47	47	44	3
Communications - Cotswold News	(20)		(20)	(20)	0
Members Allowance increases (Council, 26 November 2025)		36	36	36	0
Court Cost income (Council tax and Business Rates)	(30)	0	(30)	(45)	15
Valuation (professional fees)	(10)		(10)		(10)
Dual Use Agreement (Chipping Campden School)		10	10		10
Legal vacancies	(31)		(31)		(31)
Vacancy management	(165)	0	(165)	(205)	40
Other service variations		54	54	50	4
Subtotal	(1,518)	270	(1,248)	(853)	(395)



Non-Service/Corporate Variations					
Contingencies and Savings	(222)	0	(222)	(217)	(5)
Street Service savings	0	300	300	300	0
Development Management Fees - Appeals Risk	0	674	674	400	274
Impact of Publica Phase 2	(328)	0	(328)	(266)	(62)
New Posts not recruited	(240)	0	(240)	(240)	0
Transfer Vacancy and phase two service and recruitment saving to Capacity Building Reserve	0	733	733	710	23
Treasury Management income	(376)	0	(376)	(346)	(30)
Transfer to Treasury Management reserve	0	376	376	346	30
Transfer underspend to 'Cotswold News' Reserve		20	20		20
Transfer underspend to 'Homeless Reserve'		70	70		70
Transfer legal salary underspend to 'Legal Resource' Reserve		31	31		31
Additional EPR Grant (DEFRA), transferred to EPR Reserve	(181)	181	0	0	0
Transfer Car park surplus to 'Revenue Contribution to Capital Outlay' (RCCO)		165	165	150	15
Subtotal	(1,347)	2,550	1,203	837	366
Net Outturn Variation	(2,865)	2,820	(45)	(16)	(29)

- 2.4** The Council must ensure it can address the financial challenges arising from the Local Government Finance Settlement and Local Government Reorganisation (“LGR”) over the MTFs-period.
- 2.5** Oversight of the Vacancy Management process has been strengthened by the Corporate Leadership Team (“CLT”), with CLT authorisation required to fill a vacancy, either on a short-term or long-term basis. CLT have also reviewed the process for assessing requests for additional resources to ensure a single and consistent approach is taken to the development and appraisal of proposals and business cases.
- 2.6** As set out in paragraph 2.3 and Table ES1, the Q3 outturn forecast for the year is favourable with a surplus forecast at the end of the financial year.
- 2.7** The revenue budget is likely to come under further pressure in 2027/28 as the Council considers the impact from LGR and ensures services continue to be provided to residents as usual. There will be a demand on key staff to support the assessment of final proposal and plan for a new unitary structure in Gloucestershire, and implementation of the proposal from mid-2026 following the Government’s decision.
- 2.8** It is expected that additional capacity will be needed to support the emerging Corporate Plan, ensure services continue to be provided to residents, and support LGR. Therefore, it is proposed to maximise the level of resources available over the next 2 years, any additional budget surplus or one-off benefit is transferred to earmarked reserves (Capacity Building) at year end, subject to the final outturn position.
- 2.9** Council approved the 2026/27 Budget at their meeting on 23 February 2026. Included within the [2026-27 Revenue Budget, Capital Programme and Medium Term Financial Strategy report](#) was a Reserves and Balances forecast (Section 7). This set out the



recommendation that a balance of £1m is maintained to support the Council over the next 2 years.

2.10 With a more favourable outturn forecast and allowing for the (potential) increased cost/reliance on interim staff recommendation is to increase the reserve balance to £1.5m.

2.11 The Q3 forecast reflects a total underspend of £0.733m within employee-related budgets for 2025/26. This is due to the Vacancy Management approach set out in the Q1 and Q2 Financial Performance report:

- **Vacant** posts not yet filled, resulting in savings of £0.165m plus positions included in the 2025/26 budget for Transformation, Learning & Organisational Development and Strategic Housing have not been appointed, generating revenue savings of £0.240m.
- Lower anticipated expenditure on **recruitment** contributing £0.096m.
- Lower costs of Phase 2 of **Publica Review** against the prudent estimate resulting in an underspend of £0.232m

In line with the strategy agreed within the Q2 report, these savings are forecast to be transferred to earmarked reserves (Capacity Building) at year end, subject to the final outturn position. Consequently, the underspends have a net nil impact on the forecast variance to budget.

2.12 The material forecast variations are listed below with further details in Section 4 of this report.

- **Forecast income variations** – underachievement: Cemeteries (£39k), Environmental Protection (£15k). Additional Income: Licensing (£30k), Building Control (£44k), Bulky Waste (£31k), Recycling income (£30k), Income from Court Costs (Council tax and Business Rates) (£30k)
- **Car Parks** income from car park fees above budget (£241k), permits (£6k) and penalty charge notices (£8k)
- **Development Management Fees** – exceeded budget by £0.674m
- **Trinity Road Utility costs** - £21k under budget
- **Post and Printing** - costs forecast to exceed budget by £49k, predominantly within the Revenues and Benefits service.
- **Recycling contracts** – Kerbside collection of cans and plastics, 'bring banks' and Waste electrical electronic equipment (WEEE) undertaken by contractor (£30k favourable)
- **Commercial Property** rental income and vacant property costs (£64k adverse variation)
- **Street Services** a £0.300m adverse variation against the £0.300m savings target (£0.300m reported at Q2).



- **Treasury Management** and interest receivable performance (£0.376m positive variation, increase of £0.029m from Q2) with £0.376m to be transferred to the Treasury Management Reserve.
- **Members Allowances** – Increases to Members’ Special Responsibility Allowances, as recommended by the Independent Remuneration Panel in December 2025 and backdated to 1 April 2025, have resulted in an adverse variance of £0.036m against budget.

2.13 A summary of the Capital Programme outturn forecast is shown in the table below.

Table ES3 – Capital Programme Outturn Forecast

Capital Programme	2025/26 OB (£'000)	2025/26 LAB (£'000)	2025/26 Actuals to Q2 (£'000)	2025/26 Outturn (£'000)	2025/26 Outturn Variance (£'000)
Leisure & Communities	0	244	218	244	0
Housing/Planning and Strategic Housing	1,718	1,845	1,098	1,500	(345)
Environment	1,132	651	351	475	(176)
ICT, Change and Customer Services	350	150	120	152	2
UK Rural Prosperity Fund	0	229	131	229	0
UK Shared Prosperity Fund Projects	327	60	20	60	0
Land, Legal and Property	500	200	0	0	(200)
TOTAL Capital Programme	4,027	3,379	1,938	2,660	(719)

2.14 The capital programme is a forecast underspend of £0.719m. Further details are provided in Section 5 of this report.

2.15 The final 2025/26 outturn financial position will be presented to Members at the July 2026 Cabinet meeting.

3. EXTERNAL ECONOMIC ENVIRONMENT

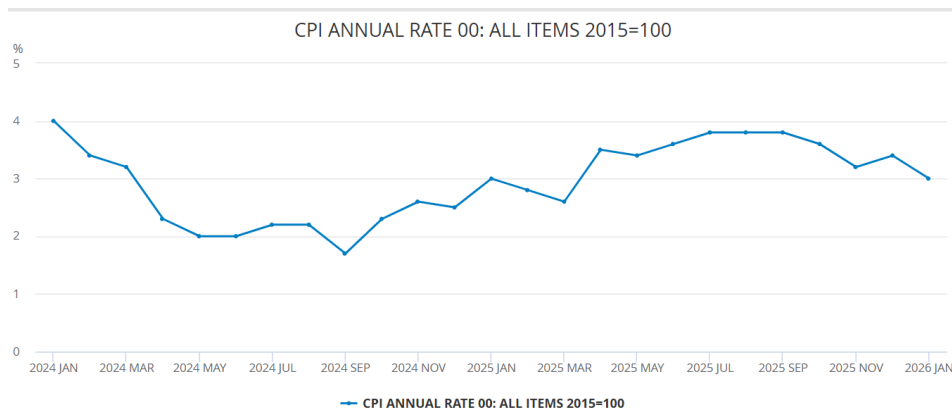
Inflationary Pressures

3.1 The level of inflation, as measured by the Consumer Prices Index, for January 2026 reduced to 3% (from 3.4% in December 2025). Although it is not the Government's preferred measure of inflation, the Retail Prices Index is 3.8% (4.2% in December 2025). Core inflation (as defined by the Office for National Statistics as the CPI Rate excluding energy, food, alcohol, and tobacco) reduced to 3.1% (3.2% in December 2025).



- 3.2** Current macroeconomic conditions also present further financial risk for the Council. Inflation is now expected to remain elevated for longer, driven largely by the sustained surge in global energy prices following the escalation of conflict in the Middle East. The near total blockade of the Strait of Hormuz has pushed oil and gas prices sharply, with analysts warning of an inflation spike during 2026 as the UK – heavily reliant on imported energy – is particularly exposed to these pressures. Forecast suggest that while inflation may ease temporarily in early 2026, it is likely to rise again mid-year before gradually falling back towards target levels.
- 3.3** Interest rate expectations have also shifted materially. Markets, which only weeks ago anticipated one or two Bank of England rate cuts in 2026, are now pricing in up to four interest rate increases before the year ends as trader respond to rising gilt yields and the inflation outlook.
- 3.4** These developments create additional cost and demand pressures across Council services, heighten uncertainty in investment planning and could lead to volatility in borrowing costs (if undertaken).

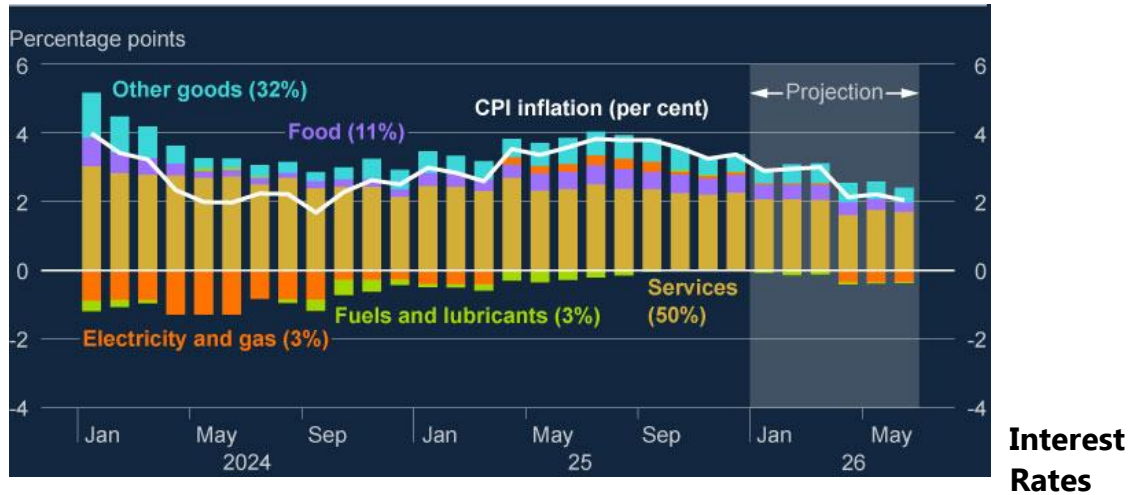
Graph A – CPI Inflation



- 3.5** Although there has been substantial disinflation over the past two years, the Council is subject to specific inflationary pressures on its services (e.g., fuel costs on waste and recycling service) which have tended to track higher than CPI and RPI but has fallen below CPI during 2025. Despite recent falls, experts note that future energy price volatility (e.g., from geopolitical events) could reverse this trend, potentially driving headline inflation up again.
- 3.6** In its February 2026 Monetary Policy Report, the Bank of England confirmed that CPI inflation is forecast to fall close to 2.1% in Q2 2026 before gradually returning to the 2% target by mid-2027. The graph below shows the CPI forecast published in the quarterly Bank of England Monetary Policy Committee report (February 2025).



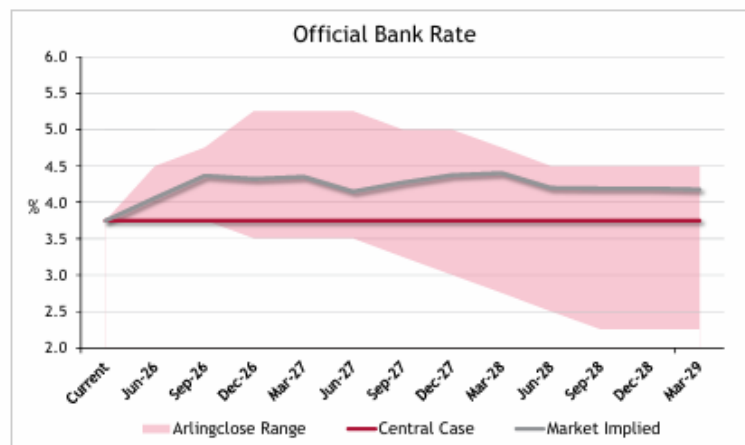
Graph B – Bank of England Chart – Inflation



Interest Rates

- 3.7 The Bank of England reduced the Base Rate by a further 0.25% to 3.75% in December 2025, noting that the economy had moved beyond “the recent peak in inflation” and that inflation had continued to fall. The Bank stated that “we have cut interest rates for the sixth time, to 3.75% today. We still think rates are on a gradual path downward. But with every cut we make, how much further we go becomes a closer call.” This reduction had been widely anticipated following the lower inflation figures reported in December.
- 3.8 Inflation remains above the 2% target, the outbreak of war in Iran and the Middle East has disrupted the transportation and supply of oil and gas, pushing up energy prices. As a result, inflation is now expected to be higher than previously forecast, making further rate cuts less likely in the short term.
- 3.9 At the **19 March 2026** meeting, the Bank of England held the Base Rate at **3.75%**. The next interest rate decision is scheduled for **30 April 2026**.

Graph C – Interest Rate Forecast (March 2026)





3.10 Whilst there is no underlying need to borrow with the Capital Programme financed through internal resources and external grants and contributions, any additional capital expenditure proposed during the year will need to consider the availability and cost of capital financing including prudential borrowing.

4. 2025/26 REVENUE BUDGET FORECAST

- 4.1** There have been marginal changes to the overall forecast since Q2; however several movements are worth noting, particularly within Planning and Car Parks; where updated income and activity levels have resulted in larger than planned transfers to earmarked reserves. Planning fee income has overachieved by £0.674m at Q3 (increase of £0.274m from Q2), and this additional income will be transferred to the 'Planning Appeals Reserve'.
- 4.2** Net car park income has improved by £0.082m, leading to a total of £0.165m above budget being allocated to fund the replacement of pay-and-display machines within the Council's Capital Programme. Forecast underspends within Homelessness (£0.070m) and Legal Service salaries (£0.031m) have also resulted in amounts being earmarked for use in future years.
- 4.3** Savings from vacancies and from the implementation of 'Publica Phase Two Review' have resulted in a total transfer of £0.733m to the Capacity Building earmarked reserve (compared to £0.710m forecast at Q2).
- 4.4** Recent global events – particularly the conflict in the Middle East which as driven sharp increases in oil and gas prices – have added renewed pressure on inflation and certainty around future energy and fuel costs. However, these impacts are likely to have a material effect on the Council's 2025/26 position, as inflation had already been easing and was expected to return close to target in early 2026. The greater concern relates to 2026/27, where sustained disruption to energy markets and market expectations of higher inflation and fuel price volatility may lead to increased cost pressures including for diesel, HVO and electricity.
- 4.5** The Revenue Budget was approved by Council at their meeting on 24 February 2025 with no adjustments made during the financial year to date.

Table 1 – Revenue Budget reconciliation

Budget Item	(£'000)
Original Budget (Council, 24 February 2025)	15,704
Adj:	
Adj:	
Adj:	
Adj:	
Latest Budget	15,704



- 4.6** The revenue budget was adjusted during Q2 as budgets are amended to reflect the transfer of services from Publica to the Council in Phase 2 of the Publica Transition. Whilst the net budget position (£15.704m) did not change, the composition of the budget (i.e. subjective split between Pay and Non-Pay budgets) and net service budgets has been amended.
- 4.7** As of 31 December 2025 (Q3) the Council's net expenditure (excluding Funding and Parish Precepts) was £9.469m against the profiled budget of £11.160m.
- 4.8** The forecast outturn for 2025/26 is £15.839m, with funding exceeding the budget by £0.182m due to a higher-than-budgeted allocation of the Extended Producer Responsibility (EPR) grant. This results in a net favourable variance of £0.045m against the net budget.
- 4.9** Table 2 provides Members with an overview of the material outturn variations forecast across services, while Table 3 details the non-service revenue expenditure and income budgets.

Table 2 – Revenue Budget Outturn Forecast Summary

	2025/26 Latest Net Budget (£'000)	2025/26 Profiled Budget to Q3 (£'000)	2025/26 Actuals to Q3 (£'000)	2025/26 Outturn Forecast (£'000)	2025/26 Outturn Variance (£'000)
Revenue Budget					
Environmental & Regulatory Services	695	467	406	633	(61)
Business Sup. Svcs - Finance, HR, Procurement	1,425	985	934	1,428	3
ICT, Change & Customer Services	2,488	1,946	1,938	2,474	(14)
Assets, Property & Regeneration	963	670	489	711	(251)
Publica Executives and Modernisation	104	77	77	104	0
Revenues & Housing Support	842	553	501	771	(71)
Environmental Services	4,755	2,683	2,376	4,441	(313)
Leisure & Communities	2,380	829	679	2,295	(85)
Planning & Strategic Housing	1,682	525	(105)	993	(689)
Democratic Services	1,366	998	967	1,351	(14)
Retained and Corporate	2,593	1,955	2,194	2,733	140
Subtotal Services	19,291	11,689	10,456	17,935	(1,356)
Less: Reversal of accounting adjustments	(1,925)		0	(1,925)	0
Revised Subtotal Services	17,366	11,689	10,456	16,010	(1,356)
Corporate Income & Expenditure	(1,663)	(529)	(986)	(171)	1,491
Provisions and Risk Items	0	0	0	0	0
Net Budget Requirement	15,704	11,160	9,469	15,839	136
Funded by:					
Council Tax	(7,065)	0	0	(7,065)	0
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Government Funding - Grants	(2,527)	(1,896)	(1,898)	(2,527)	0
Government Funding - NHB	(820)	(615)	(615)	(820)	0
Extended Producer Responsibility (EPR)	(1,502)	(1,127)	(1,261)	(1,683)	(181)
Collection Fund (surplus) / Deficit	689	0	0	689	0
TOTAL Funding	(16,342)	2,705	2,570	(16,523)	(181)
Budget shortfall/(surplus)	(638)	13,865	12,039	(684)	(45)



Table 3 – Corporate Income and Expenditure

Corporate Income and Expenditure	2025/26 Latest Net Budget (£'000)	2025/26 Actuals to Q3 (£'000)	2025/26 Outturn Forecast (£'000)	2025/26 Outturn Variance (£'000)
Savings & Contingency and non service income and exp	473	94	91	(383)
Treasury Management - Interest Payable	5	2	5	(0)
Treasury Management - Interest Receivable	(1,303)	(1,083)	(1,679)	(376)
Minimum Revenue Provision (MRP)	9	0	9	0
Revenue Contribution to Capital Outlay (RCCO)	0	0	165	165
Transfer to/(from) Earmarked Reserves	(846)	0	1,239	2,085
	(1,662)	(986)	(170)	1,491

- 4.10** As outlined, the forecast outturn position is a net underspend/favourable variance of £0.045m, a small increase in the reported forecast outturn since Q2 and includes proposed transfers of a number of forecast underspends outlined in 4.12 and 4.35 below.
- 4.11** The Council must ensure it can address the financial challenges arising from the Local Government Finance Settlement and Local Government Reorganisation (“LGR”) over the MTFs-period.
- 4.12** Oversight of the Vacancy Management process has been strengthened by the Corporate Leadership Team (“CLT”), with CLT authorisation required to fill a vacancy, either on a short-term or long-term basis. CLT have also reviewed the process for assessing requests for additional resources to ensure a single and consistent approach is taken to the development and appraisal of proposals and business cases.
- 4.13** As set out in paragraph 2.3 and Table ES1, the Q3 outturn forecast for the year is favourable with an increased surplus likely at the end of the financial year.
- 4.14** The revenue budget is likely to come under further pressure in 2026/27 and 2027/28 as the Council considers the impact from LGR and ensures services continue to be provided to residents as usual. There will be a demand on key staff to support the assessment of final proposal and plan for a new unitary structure in Gloucestershire, and implementation of the proposal from mid-2026 following the Government’s decision.
- 4.15** It is anticipated that additional capacity will be required to support delivery of the emerging Corporate Plan, maintain continuity of services for residents, and prepare for Local Government Reorganisation (LGR). To achieve this, it is proposed to maximise the resources available over the next two years by transferring any additional budget



surplus or one-off benefits to earmarked reserves (Capacity Building) at year-end, subject to the final outturn position.

- 4.16** Council approved the 2026/27 Budget at their meeting on 23 February 2026. Included within the [2026-27 Revenue Budget, Capital Programme and Medium Term Financial Strategy report](#) was a Reserves and Balances forecast (Section 7). This set out the recommendation that a balance of £1m is maintained to support the Council over the next 2 years.
- 4.17** With a more favourable outturn forecast and allowing for the (potential) increased cost/reliance on interim staff recommendation is to increase the reserve balance to £1.5m
- 4.18** This report assumes that the following underspends will be transferred to the Capacity Building earmarked reserve:
- £0.165m savings from vacancy management plus £0.240m new posts included in the 2025/26 budget
 - £0.328m underspend against the forecast impact of Publica Phase 2
- This results in a total transfer of £0.733m to the Capacity Building earmarked reserve.
- 4.19** This assumes that there are no additional expenditure commitments that would require support from the Financial Resilience Reserve (FRR). For the avoidance of doubt, the working assumption in the outturn forecast is:
- there is no material deterioration in the outturn forecast in Q4.
 - additional expenditure in any particular service area is offset by a corresponding decrease in expenditure in other service areas.

Key Variations

- 4.20** The material items which have had an impact on the Council's revenue budget are summarised below with narrative explaining the reasons(s) for the variation in the paragraphs that follow.
- 4.21** It is not expected that the £0.300m cost reduction included in the 2025/26 revenue budget for Street Cleaning will be achieved in the current financial year, as previously reported in the Q2 report. Initial scoping work has identified potential cost reductions and service efficiencies, and a broader review of service options is underway to ensure that service standards are clearly defined and aligned with deliverable savings. Following the APSE (Association of Public Service Excellence) review of service operations, options for cost reduction are now being evaluated and tested ahead of any decisions on future service design.



- 4.22 Cemetery fees** – forecast shortfall in income of £39k (£34k Q2) due to continued lower service use in Q3.
- 4.23 Licensing income** – is forecast to exceed budget by £30k largely in respect of taxi drivers' licences. (£30k at Q2)
- 4.24 Development Management fees** - overachievement of planning fees by £0.624m at Q3. This includes £1.267m of Planning Fees (29 Major, 215 Minor, 692 Other) (budget of £0.656m) £0.120m of Pre-Application fees (215), (budget of £0.107m).
- 4.25** The service has overachieved in planning application fee income as a result of a series of major housing and other developments that came forward within the three quarters of the financial year. Following the changes to the National Planning Policy Framework in December 2024, the Council can no longer demonstrate a 5-year housing land supply. This has resulted in a number of speculative housing and other developments coming forward during the first three quarters of 2025/26:
- 195 and 110 dwellings in Moreton-In-Marsh
 - 150 dwellings in Lechlade
 - 98 dwellings in Fairford (approved in September 2025)
 - 120, 95 and 60 dwellings in Mickleton
 - Solar farm near Siddington
 - Aldi food store in Bourton on the Water.
- 4.26** The team have received a number of pre-application enquiries relating to other potential future developments and the emerging Local Plan is likely to encourage early submission of potential site allocations with a number of these pre-applications progressing to full application stage.
- 4.27** This increase in planning applications (and associated income from fees) for major housing developments does bring additional risks. As a large number of these schemes are speculative, it is likely that a number will be refused permission and will therefore result in appeals or where granted could also be subject to judicial review. Given the scale of development, there is a high chance appeals are dealt with as informal hearings or inquiries which bring greater costs to the Council. Planning permission was recently refused for 54 dwellings in Lechlade, which will be dealt with as an appeal hearing in May, with the Public Inquiry for the 195 dwelling scheme in Moreton in Marsh taking place in April.
- 4.28** **It was approved in principle at the September 2025 Cabinet meeting to hold 50% of the forecast additional income as a risk provision to have the effect of reducing the net variation during the financial year. Due to the favourable position reported at Q2 and subject to the final outturn position for Development Management Fees remaining positive (i.e. income received in the year is above the budgeted level), it was approved that 100% of the variation is transferred to the Planning Appeals reserve.**



- 4.29** The Council is forecasting expenditure of around £0.300m on the **Local Plan** in 2026/27, including staff, consultancy and IT licence costs. This will be fully funded from the **Local Plan reserve** and will therefore have no impact on the Council's forecast outturn position.
- 4.30** The Council is not expected to achieve the budgeted level of commercial rental income from its **Investment Properties** due to ongoing economic challenges in the retail and office sectors, which are exerting downward pressure on rents. A forecasted income shortfall of £0.064m is forecast primarily related to the out-of-district investment property (former Wilko's store in Great Bridge, Tipton). A lease agreement with a new tenant was agreed earlier in the calendar year, with occupation commencing in July 2025 following completion of fit-out. In common with most commercial lettings, the lease agreement includes a six-month rent-free period. The variation arises due to the new lease commencing later than anticipated than the budget assumption, and additional empty property costs over the time period.
- 4.31** Following the installation of Solar PV at Trinity Road and rental income from the **tenanted areas of Trinity Road Offices**, the Council is forecast to achieve £0.045m, in income for 2025/26. This represents an excess of £0.020m above the budgeted target of £0.025m. Live data dashboards provide updates on occupancy and enquiries supporting proactive management. Formal quarterly performance meetings continue to monitor process. Current occupancy: 45% of offices let and 46.5% of available desks occupied.
- 4.32** Income from the Council's **Car Parks** has continued to perform positively in the first three quarters of 2025/26 with income forecast to exceed budget by £0.241m. Income from Car park permits is also expected to exceed budget by £0.006m whilst Penalty Charge Notices (PCNs) is forecast to be £0.008m above target, income budgets for 2025/26 were reduced to reflect current financial performance and ensure the budget estimates approved by Council in February 2025 were robust. The Council's Car Parking Strategy 2025-2028 and action plan, approved and adopted by Cabinet in November 2025 included a recommendation to consider strengthening enforcement resources to match the needs of the district.
- 4.33** The car park expenditure budget includes a forecast underspend of £0.024m, primarily relating to costs such as repairs and maintenance, business rates and parking and permit software charges.
- 4.34 Building Control** – The first three quarters of 2025/26 has seen a notable improvement in performance compared to 2024/25. Market share is averaging 68% up to the end of Q3, with 396 applications processed, representing a 9% increase in market share compared to the same period last year. Application volumes remain



steady, with only a slight year-on-year decrease of 6 applications. Income has exceeded the budget by £0.048m to date. Building regulation fees were increased for the 2025-26 financial year to better reflect the cost of running the service. Forecast income outturn is currently reported as being £0.060m above budget. Expenditure is forecast to be overspend by £0.016m due in part to audit fees arising from the Building Safety regulator. Despite this expenditure pressure, the service is forecasting a net favourable variance of £0.044m.

4.35 Public Conveniences – Income from public conveniences charges is currently in line with the approved budget. Charging has been implemented at ten of the eleven public conveniences across the district, including Chipping Campden, Tetbury and Lechlade from August 2025. Further options will need to be explored during 2026/27 to minimise or eliminate entirely the net subsidy required to operate these facilities of £0.164m for 2025/26 (excluding depreciation and assumes income of £0.110m from fees). The public conveniences in Northleach where no charge is currently applied, are scheduled to transfer to Northleach and Eastington Town Council from 1st April 2026, subject to an agreement and the provision of a one-off grant of £0.008m

4.36 Land Charges – income is forecast to be above target at the end of the financial year (£0.036m favourable) Application volumes have seen a notable increase in the first three quarters of 2025/26, with 1,243 searches received, compared to 1,081 in Q3 2024/25. This represents a 15% year-on-year rise, significantly above the typical average for this point in the year of around 1,000 applications. 444 searches have also been received between January and February 2026 (compared to 395 in the last quarter and 295 for the same period last year). These included a large multiple plot search from a local housing association.

4.37 Green Waste fees achieved the budgeted income of £1.588m by the third quarter of the 2025/26 financial year.

4.38 Despite an increase in budget of £0.030m in 2025/26, Expenditure in respect of **postage and printing**, predominantly within the revenues and benefits and garden waste service is forecast to be overspent by £0.047m by the end of the financial year. This includes 6,374 letters sent out as part of the LIFT project and increases in pricing. The 2026/27 budget has been adjusted to reflect increased costs and demands and will be monitored during 2026/27.

4.39 Members' Allowances – Increases to Members' Special Responsibility Allowances, as recommended by the Independent Remuneration Panel in December 2025, to reflect the workload and leadership responsibilities of Members holding special responsibility posts (Leader, Deputy Leader, Chair, Vice Chair, Committee Chairs/Vice Chairs, Leader



of the opposition), were backdated to 1 April 2025. These changes have resulted in an adverse variance of £0.036m against budget.

4.40 Underspends relating to **Homelessness**—arising from higher than forecast grant income (£76k)—together with underspends relating to **Legal Services team vacancies** (£31k) and the delayed publication of **Cotswold News** (£20k), which will now be issued early in 2026/27, are to be transferred to earmarked reserves (subject to approval) as part of the closure of the 2025/26 financial year. These funds will be drawn down for use in 2026/27.

4.41 Ubico Contract – the Council’s Environmental (grounds maintenance, street cleaning, domestic waste collection, recycling collections etc) are provided by Ubico Ltd. The contract with Ubico for 2025/26 of £8.863m is forecast to cost £8.926m – an adverse variation of £0.063m This is predominantly due to additional costs of £0.097m due to higher than estimated vehicle hire and repair costs (£0.044m), higher training costs (£0.010m) and higher employee costs caused by high levels of sickness in waste and recycling (£0.116m), offset by vacancies within street cleaning, grounds and cemetery (£0.111m). These pressures have been partially mitigated by lower diesel costs due to favourable pump prices compared to budget throughout the majority of the year (£0.090m), recent increases in pump prices have been factored into the outturn position. The table below provides members with an overview of the financial performance of the Ubico Contract (table 5).

Table 5 – Ubico Contract Monitoring

Waste, Recycling, Street Cleaning and Grounds Maintenance Services	Ubico Contract Costs OB (£'000)	Ubico Contract Costs CS (£'000)	Forecast Outturn (£'000)	Forecast Outturn Variance (£'000)
Car Parks GM [CTW668]	68	68	60	(8)
CCM001 Cemetery/Churchyards GM [CTW688]	166	166	146	(19)
RYC002 Garden Waste Collection [CTW634]	1,310	1,310	1,316	7
WST001 Household Waste [CTW611]	1,844	1,844	1,879	35
RYC001 Recycling [CTW633]	3,340	3,340	3,403	63
RYC003 Refuse/Recycling/Food Waste [CTW635]	732	732	769	37
STC001 Street Cleaning [CTW666]	1,387	1,387	1,337	(50)
Trinity Road Offices GM [CTW668]	17	17	15	(2)
Grand Total	8,863	8,863	8,926	63
Net variation on contract				63



Treasury Management

- 4.42** Dividends from the Council's longer-term investments (Pooled funds and Real Estate Investment Trusts) of £0.393m were received in the nine months to the 31 December 2025 year achieving a return of 4.88%. Interest from short term cash deposits including the Debt Management Office (DMO) was £0.657m due to higher surplus balances and interest rates remaining at a higher level than assumed in the budget and MTFS.
- 4.43** It should be noted that the budgeted level of net investment income for 2025/26 is £1.208m – a decrease of £0.077m over the 2024/25 budgeted level and recognises the current interest rate position. This is a prudent estimate for the year and is lower than the final 2024/25 level of investment income achieved of £1.621m given the forecast interest rate reductions over the financial year.
- 4.44** It is not expected that the current interest rate level will be maintained over the MTFS period, as set out in Section 3 of this report, with expectations of investment income in 2026/27 reducing to £1.1m with a further reduction to £0.867m by 2027/28.
- 4.45** A prudent forecast of investment income has been included in the outturn forecast of £1.515m. This includes the expectation that the base rate would be reduced in March 2026 to 3.5% (which is now less likely, given rising geopolitical risks). This results in a £0.376m positive variance against budget and subject to the outturn position at year end will be transferred to the Treasury Management risk reserve to mitigate any potential losses on pooled funds or borrowing costs in the future.
- 4.46** The level of investment income for the year will depend on the performance of both short-term investments (Money Market Funds, deposits with the DMO) and dividends from the long-term investment. The table below provides members with a high-level overview of the Council's Treasury Management investments on 31 December 2025.



Table 6 – Treasury Management Investments

Investment type	Balance Invested at 31/12/25 (£'000)	Investment Income received to 31/12/2025 (£'000)	2025/26 Forecast (£'000)	Interest Rates at 31/12/25 (%)
Bank of England DMADF	17,180	338	611	3.74
Money Market Funds				
Federated Money Market Fund	3,000	95	122	3.92
DGLSMoney Market Fund	3,000	95	122	3.91
Insight Liquidity Money Market Fund	3,000	88	116	3.88
Lloyds Instant Access	1,500	17	18	3.51
Santander Call Account	1	-	1	1.98
Other Short-term deposits	1,500	24	24	3.89
Real Estate Investment Trusts (REIT)				
Fundamentum Housing REIT	640	8	30	3.01
Cash Plus Fund				
Federated Cash Plus Fund	1,252	-	-	N/A
Pooled Funds				
CCLA Property Fund	2,198	75	98	3.99
Schroders Income Maximiser Fund	982	55	66	8.67
CCLA Cautious Multi Asses Fund	932	23	27	4.58
M&GUK Income Fund	2,063	88	104	10.71
Ninety-One (Investec) Diversified Fund	1,850	66	87	4.30
Columbia Threadneedle Bond Fund	1,967	65	88	4.14
	41,065	1,037	1,514	4.59

4.47 Council approved the Capital Strategy and the Treasury Management Strategy (including the Non-Treasury Management Investment Strategy) at their meeting on 24 February 2025. Audit and Governance Committee have responsibility for reviewing and monitoring treasury management arrangements in accordance with the CIPFA Treasury Management Code and receiving performance reports. The Council adopted the Chartered Institute of Public Finance and Accountancy's Treasury Management in the Public Services: Code of Practice (the CIPFA Code) which requires the Council to approve, as a minimum, treasury management semi-annual and annual outturn reports.



4.48 The CIPFA Code was updated in 2021 and includes the mandatory requirement, from 01 April 2023, of quarterly reporting of the treasury management prudential indicators. The non-treasury prudential indicators are expected to be included in the Council's usual revenue and capital monitoring reports. Section 5 and **Annex B** of this report provide members with an overview on the non-treasury position.

Corporate Income and Expenditure, Provisions, and Risk

4.49 As outlined in Tables 3 and 4 there are variations forecast across the Corporate Income and Expenditure budgets. These budgets support the General Fund Revenue budget and are typically the non-service items such as Treasury Management, financing, contingency budget, and provisions for risk.

4.50 As outlined earlier in the report, a risk provision of £0.300m has been included in the outturn forecast to cover an expected shortfall against the Street Cleaning savings target of £0.300m.

4.51 As outlined earlier in this section, the performance of the Council's Treasury Management Investments is a result of higher than anticipated interest rates and surplus balances to invest.

5. CAPITAL PROGRAMME

5.1 Council approved the revised Capital Programme for 2025/26 at their meeting on 23 February 2026. The Capital Programme has been updated to reflect adjustments as set out in Table 8 below.

5.2 The revised capital programme for 2025/26 is £3.379m with a total net spend of £1.938m as at 31 December 2025.



Table 7 – Capital Programme budget reconciliation

Capital Programme Reconciliation	(£'000)
Original Budget (Council, 24 February 2025)	4,027
Slippage from 2024/25(Cabinet 10 July 2025)	565
Reallocation of the UKSPF capital budget (£0.327m) as follows: - £0.229m to Rural England Prosperity -£0.060m to UK Shared Prosperity Fund (UKSPF Capital) in line with agreed allocations. This results in a net reduction of £0.038m, in line with agreed allocations.	(38)
Revised Capital Programme (Council 23 February 2026)	(1,175)
Latest Budget	3,379

Table 8 – Capital Programme Outturn Forecast

	2025/26 OB (£'000)	2025/26 LAB (£'000)	2025/26 Actuals to Q2 (£'000)	2025/26 Outturn (£'000)	2025/26 Outturn Variance (£'000)
Capital Programme					
Leisure & Communities	0	244	218	244	0
Housing/Planning and Strategic Housing	1,718	1,845	1,098	1,500	(345)
Environment	1,132	651	351	475	(176)
ICT, Change and Customer Services	350	150	120	152	2
UK Rural Prosperity Fund	0	229	131	229	0
UK Shared Prosperity Fund Projects	327	60	20	60	0
Land, Legal and Property	500	200	0	0	(200)
TOTAL Capital Programme	4,027	3,379	1,938	2,660	(719)

5.3 The outturn forecast for the current year is an underspend of £0.719m. **Annex A** sets out the detailed forecast outturn with commentary from budget holders and is summarised in table 8 above.



5.4 The Capital Programme was significantly revised in the budget papers considered by Council at their meeting on 23 February 2026. The significant variations forecast on the Capital Programme are:

- **Asset Management Strategy** - A forecast underspend of £0.200m is anticipated against the revised budget, primarily due to planned roof works at Abberley House being deferred to 2026/27. The delay reflects the need to align the works with the wider asset management and funding will be reprofiled in the 2026/27 capital programme.
- **Private Sector Housing Renewal (Disabled Facilities Grant)** - Estimated that the annual expenditure will be approximately £1.5m resulting in an underspend of £0.275m.
- **Provision for financing of Ubico Vehicles** – underspend of £0.254m forecast against budget. Procurement for the replacement of five 3.5-tonne cage vehicles has been completed, and the vehicles are scheduled for delivery in Q1 of 2026/27. As part of the year-end outturn process, it is expected that the associated budget will be carried forward into 2026/27, subject to approval.
- **Bromford Joint Venture - (£0.070m)** Planning consent was granted on the 12 March, However Bromford need to resolve issues around drainage which is delaying the commencement of the work. This may delay commencement of works until 2027 unless Thames Water bring their upgrade plans forward.
- **Public Conveniences** – Accelerated rollout of payment devices including new doors at West Street (Tetbury), Chipping Campden, Lechlade, Northleach, and replacement paddle gates at the two facilities in Bourton-on-the-Water (Rissington Road and Church Rooms). Additional spend of £0.050m will be funded from capital receipts.
- **Waste and Recycling Receptacles** - The rolling budget for the purchase of waste and recycling receptacles is forecast to overspend by £0.050m in 2025/26. This pressure reflects continued growth in the number of properties and an increase in replacement container requests. Officers will review whether the existing budget is sufficient for 2026/27, noting that container replacement rates are currently being benchmarked as part of a waste review being undertaken by Tetra Tech. The forecast overspend for 2025/26 will be funded from capital receipts.

5.5 At their meeting on 31 October 2023 Overview and Scrutiny Committee recommended that the Capital Programme should be kept under review to ensure the revenue impact of capital expenditure and financing decisions were fully considered.



Capital Receipts and Disposals

- 5.6** There have been no asset disposals during the third quarter of the financial year. Total net receipts of £0.568m received in the 2025/26 financial year to date, no further receipts are forecast.

Table 9 – Capital Financing Forecast

Capital Financing Statement	2025/26 OB (£'000)	2025/26 LAB (£'000)	2025/26 Outturn (£'000)	2025/26 Outturn Variance (£'000)
Capital receipts	2,052	952	508	(444)
Capital Grants and Contributions	1,975	2,334	2,059	(275)
Earmarked Reserves	0	0	0	0
Revenue Contribution to Capital Outlay (R	0	0	0	0
Community Municipal Investments (CMI)	0	93	93	0
Prudential Borrowing	0	0	0	0
	4,027	3,379	2,660	(719)

- 5.7** The Capital Financing position set out in the table above will be reviewed by the s151 Officer as part of the financial year end closedown process as expenditure forecasts are updated to ensure a balanced use of capital resources and mitigation of current and future interest rates.

6. NON-TREASURY MANAGEMENT SUMMARY

- 6.1** The CIPFA Code was updated in 2021 and includes the requirement, mandatory from 01 April 2023, of quarterly reporting of the treasury management prudential indicators. The non-treasury prudential indicators are expected to be included in the Council's usual revenue and capital monitoring reports.

Prudential Indicators

- 6.2** The detailed Non-Treasury Management prudential indicators are included in **Annex B** with the commentary below providing members with a high-level summary.
- 6.3** Whilst there is no underlying need to borrow with the Capital Programme financed through internal resources and external grants and contributions, any additional capital expenditure proposed will need to consider the availability and cost of capital



financing. The 2025/26 outturn Treasury Management report to Audit and Governance Committee in July will set out the wider impact on the Capital Financing Requirement.

7. RISKS AND UNCERTAINTIES

- 7.1** The Q2 report outlined risks and uncertainties around the wider economic environment and achieving the Street Saving of £0.300m. Savings associated with the street cleaning service are now unlikely to be achieved.
- 7.2** As outlined in section 3 and 4.2, interest rates remained relatively high throughout 2025/26; with the Bank of England maintaining the base rate at 3.75% as it balanced easing domestic inflation against heightened geopolitical risks. Inflation had been falling and was expected to return close to the 2% target in early 2026, though the surge in global energy prices following conflict in the Middle East has introduced renewed upward pressure creating uncertainty for the next financial year.
- 7.3** A further risk was identified at Q2 concerning the additional Development Management fees received in the first half of the financial year and the forecast for the financial year. With an increase in speculative applications, it was agreed it would be prudent to set aside 100% of any potential additional income against planning appeals. This risk remains.

8. CONCLUSIONS

- 8.1** As set out in paragraph 2.3 and Table ES1, the Q3 outturn forecast for the year is favourable with a small surplus likely at the end of the financial year.
- 8.2** Income and expenditure budgets will continue to be monitored closely in the last month of the financial year.
- 8.3** The Council must ensure it can address the financial challenges arising from the Local Government Finance Settlement and Local Government Reorganisation ("LGR") over the MTF5-period.
- 8.4** This monitoring report provides an update on the Council's financial position. As outlined in the report, the forecasted favourable outturn will enable a transfer of £0.733m from underspends related to recruitment, vacancies, and the Publica review costs to the Capacity Building Reserve at year-end. This transfer will support capacity-building initiatives in preparation for Local Government Reorganisation (LGR).
- 8.5** The increase in major planning applications (and associated income from fees) for housing developments does bring additional risks. As a large number of these schemes are speculative, it is likely that a number will be refused permission and will therefore result in appeals. Given the scale of development, there is a high chance



appeals are dealt with as informal hearings or inquiries which bring greater costs to the Council. Planning permission was recently refused for 54 dwellings in Lechlade, which will be dealt with as an appeal hearing in May, with the Public Inquiry for the 195 dwelling scheme in Moreton-in-Marsh taking place in April.

At its January 2026 meeting, Cabinet approved in principle that 100% of income generated in excess of the budgeted amount be transferred to the Planning Appeals earmarked reserve, given the favourable forecast outturn position. Based on current forecasts, £0.674m is expected to be transferred

9. FINANCIAL IMPLICATIONS

9.1 The detailed financial implications are set out in the report.

10. LEGAL IMPLICATIONS

10.1 Under Part 2 Local Government Act 2003, the Council must, from time to time during the year, review the calculations it has used to set its budget. The Council's Chief Financial Officer is required to report to the Council on the robustness of estimates made for the purposes of calculating the annual budget, and on the adequacy of proposed financial reserves. Members must have regard to that report when making decisions about the calculations in connection with which it is made.

11. RISK ASSESSMENT

11.1 Section 7.7 of the report set out the material risks and uncertainties.

12. EQUALITIES IMPACT

12.1 None

13. CLIMATE AND ECOLOGICAL EMERGENCIES IMPLICATIONS

13.1 None

14. BACKGROUND PAPERS

14.1 None

(END)

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Annex B - Capital Programme 2025/26 - Q.3

Capital Programme by Service Area	2025/26 Budget [Incl. 24/25 slippage] (£'000)	2025/26 Schemes approved in-year (£'000)	2025/26 Revised Budget (£'000)	2025/26 Actuals to Q.3 (£'000)	2025/26 Variance to Q.3 (£'000)	2025/26 Committed Expenditure (£'000)	2025/26 Forecast Out-Turn Variance (£'000)	Commentary
Leisure and Communities								
Spa pool - Bourton Leisure Centre	34	0	34	28	(6)	6	0	Contractors have encountered several challenges while installing the spa pool. They located and repaired one leak, but a second leak was subsequently discovered. Although Freedom Leisure has arranged for multiple contractor investigations, the second leak has not yet been identified, and installation cannot progress until it is resolved. A leak detection specialist is now being sought.
Crowdfund Cotswold	30	0	30	10	(20)	0	0	Expenditure to date relates to funds currently held by Cotswold's funding platform partner, Spacehive, for projects that have been approved but are not yet completed. Crowdfund Cotswold supports both capital and revenue projects. There were two funding rounds in 2025/26, supporting a total of £160,000 worth of projects.
CIL - Cycle path provision	0	0	180	180	0	0	0	As per Cabinet decision of 5 September 2024, the scheme was approved through the CIL Bidding process. The project proposes re-using the former railway line between Kemble and Cirencester for cycling, with the allocated funds being used to develop deliverable outline designs. This scheme is linked to a second bid submitted by Gloucestershire County Council, which aims to create a connecting route between The Steadings and Cirencester Town Centre.
Housing/Planning and Strategic Housing								
Private Sector Housing Renewal Grant (DFG)	1,775	0	1,775	1,098	(677)	402	(275)	Disabled Facilities Grants provide financial support to help disabled people make essential adaptations to their homes so they can live independently and safely. Adaptations can include ramped access, widened doorways, stairlifts, level-access showers, or extensions such as ground-floor bedrooms, and must be recommended as necessary and practicable following an Occupational Therapy assessment. At Q.3 it is estimated that the annual expenditure will be approx. £1.5m. on adaptations completed/committed to, within the district.
Bromford Joint Venture Partnership	70	0	70	0	(70)	0	(70)	Budget unlikely to be required in 2025/26 due to slippage on wider programme by Bromford (drainage requirements - Thames Water).

Capital Programme by Service Area	2025/26 Budget [Incl. 24/25 slippage] (£'000)	2025/26 Schemes approved in-year (£'000)	2025/26 Revised Budget (£'000)	2025/26 Actuals to Q.3 (£'000)	2025/26 Variance to Q.3 (£'000)	2025/26 Committed Expenditure (£'000)	2025/26 Forecast Out-Turn Variance (£'000)	Commentary
Environment								
Waste & Recycling receptacles	82	0	82	107	25	0	49	Rolling budget for the purchase of waste receptacles due to growth in properties or replacements.
Provision for financing of Ubico Vehicles	790	0	292	38	(254)	248	(254)	This budget is to fund the Capital Fleet Replacement Programme for Ubico. It was approved during 2025/26 to also fund the installation of a vehicle ramp at Packers Lease Depot, South Cerney. The installation was completed during Q.1. Procurement for the replacement of five 3.5-tonne cage vehicles has been completed, and the vehicles are scheduled for delivery in Q1 of 2026/27. As part of the year-end outturn process, it is expected that the associated budget will be carried forward into 2026/27 subject to approval.
Fuel Bunkering (Ubico)	60	0	0	0	0	0	0	A report on the fuel tank installation, aimed at enabling the purchase of HVO and reducing carbon emissions, was presented to Cabinet in January 2026. The fuel tank location has now been confirmed at the depot, and further due diligence is underway, including obtaining estimates for associated civils work and updating the costs for the tank, fuel management system, and security requirements. Budget has been carried forward to 2026/27 following approval of the 2026/27 budget and MTFs.
In cab technology (Street Cleaning)	60	0	60	24	(36)	15	(21)	In-cab technology has been rolled out to the street cleansing services. A request has been received from Ubico to refresh the remaining in-cab devices within the waste collection fleet. The refresh is required because the current devices are no longer receiving security patches, creating an increasing security and compliance risk. In addition, support for the existing devices will end on March 2026, meaning our current tablets are already operating on unsupported platforms, which may affect system reliability and ongoing support. As part of the year-end outturn process, it is expected that £15k of the associated underspend budget will be carried forward into 2026/27 to cover these costs subject to approval.
On Street Residential Chargepoint Scheme (ORCS)	183	0	183	118	(65)	65	0	Final grant submissions were made for the installation of 24 new EV charge points across Tetbury, Moreton-in-Marsh, Stow-on-the-Wold and Cirencester. A safety issue affecting one charger at Brewery, Cirencester is being resolved with the supplier.

	2025/26 Budget [Incl. 24/25 slippage] (£'000)	2025/26 Schemes approved in-year (£'000)	2025/26 Revised Budget (£'000)	2025/26 Actuals to Q.3 (£'000)	2025/26 Variance to Q.3 (£'000)	2025/26 Committed Expenditure (£'000)	2025/26 Forecast Out-Turn Variance (£'000)	Commentary
Capital Programme by Service Area								
Public Toilets - Card Payment (bc)	34	0	34	64	30	0	50	Installation of payment mechanisms and new doors at West Street (Tetbury), Chipping Campden, Lechlade, Northleach, and replacement paddle gates at Rissington Road and Church Rooms completed in Q2.
Replace/Upgrade Pay and Display machines	125	0	0	0	0	0	0	Budget has been carried forward to 2026/27 following approval of the 2026/27 budget and MTFs.
ICT, Change and Customer Services								
ICT Capital	150	0	150	120	(30)	32	2	Expenditure on Civica software to ensure PCI-DSS compliant and service charges and the ongoing laptop replacement programme. Upgrade of Council Chamber audio/visual equipment including microphones, licences and MS Teams link, to be funded from ICT reserve.
Planning Documents and Scanning Solution	200	0	0	0	0	0	0	Planning service and ICT are scoping improvements to the IDOX system as part of a wider service transformation agenda to focus on delivering service efficiencies through ICT. No expenditure during the current financial year. Budget has been carried forward to 2026/27 following approval of the 2026/27 budget and MTFs.

Capital Programme by Service Area	2025/26 Budget [Incl. 24/25 slippage] (£'000)	2025/26 Schemes approved in-year (£'000)	2025/26 Revised Budget (£'000)	2025/26 Actuals to Q.3 (£'000)	2025/26 Variance to Q.3 (£'000)	2025/26 Committed Expenditure (£'000)	2025/26 Forecast Out-Turn Variance (£'000)	Commentary
UK Prosperity schemes:								
UK Shared Prosperity Fund Projects	327	-267	60	20	(40)	40	0	The UKSPF funding is now fully committed following an open application process and is expected to be spent in full before the end of the financial year.
Rural England Prosperity Fund	0	229	229	131	(98)	98	0	The REPF funding is now fully committed following an open application process and is expected to be spent in full before the end of the financial year.
Land, Legal and Property								
Asset Management Strategy	672	0	200	0	(200)	0	(200)	Abberley House roof works project is currently at the scoping stage and is expected to be finalised by the end of the financial year. Subject to approval, a procurement exercise will be undertaken in April, with the aim of commencing works during May/June 2026/27. As part of the year-end outturn process, it is expected that the associated budget will be carried forward into 2026/27 subject to approval.
	4,592	-38	3,379	1,938	(1,441)	906	(719)	

ANNEX B NON-TREASURY MANAGEMENT PRUDENTIAL INDICATORS

ANNEX B: Non-Treasury Prudential Indicators

1. BACKGROUND

1.1 The Council measures and manages its capital expenditure, borrowing and commercial and service investments with reference to the following indicators. It is now a requirement of the CIPFA Prudential Code that these are reported on a quarterly basis

2. CAPITAL EXPENDITURE

2.1 Cotswold District Council has undertaken and is planning capital expenditure as summarised below.

Capital Expenditure	2024/25 actual (£)	2025/26 forecast (£)	2026/27 budget (£)	2027/28 budget (£)
General Fund services	6,909,309	2,660,000	10,489,000	4,057,000
Capital investments	211,101	0	0	0

2.2 The main General Fund capital projects this year include expenditure in respect of Disabled Facilities Grants, purchase of Ubico Vehicles, EVCPs, CIL approved project (cycle path provision) and ICT expenditure.

3. CAPITAL FINANCING REQUIREMENT

3.1 The Council's cumulative outstanding amount of debt finance is measured by the capital financing requirement (CFR). This increases with new debt-financed capital expenditure and reduces with Minimum Revenue Provision (MRP) and capital receipts used to replace debt.

Capital Financing Requirement (CFR)	2024/25 actual (£)	2025/26 forecast (£)	2026/27 budget (£)	2027/28 budget (£)
General Fund services	360,000	470,000	428,000	396,000
Capital investments	0	0	0	0
TOTAL CFR	360,000	470,000	428,000	396,000

4. GROSS DEBT AND THE CAPITAL FINANCING REQUIREMENT

4.1 Statutory guidance is that debt should remain below the capital financing requirement, except in the short term. The Council has complied and expects to continue to comply with this requirement in the medium term as is shown below.

ANNEX B NON-TREASURY MANAGEMENT PRUDENTIAL INDICATORS

	31/03/2025 actual (£)	31/03/2026 forecast (£)	31/03/2027 budget (£)	31/03/2028 budget (£)	Debt at 31.12.2025 (£)
Gross Debt and CFR					
Debt (incl. PFI & leases)	260,000	160,000	5,000	0	213,000
Capital Financing Requirement	360,000	470,000	428,000	396,000	

5. DEBT AND THE AUTHORISED LIMIT AND OPERATIONAL BOUNDARY

- 5.1 The council is legally obliged to set an affordable borrowing limit (also termed the Authorised Limit for external debt) each year. In line with statutory guidance, a lower "operational boundary" is also set as a warning level should debt approach the limit.

Debt, Authorised Limit and Operational Boundary	Maximum Debt Q2 2025/26 (£)	Debt as at 31/12/2025 (£)	2025/26 Authorised Limit (£)	2025/26 Operational Boundary (£)	Complied? Yes/No
Borrowing	10,000,000	213,000	10,000,000	5,000,000	Yes
PFI and Finance Leases	0	0	0	0	Yes
TOTAL Debt	10,000,000	213,000	10,000,000	5,000,000	

- 5.2 Since the operational boundary is a management tool for in-year monitoring it is not significant if the boundary is breached on occasions due to variations in cash flow, and this is not counted as a compliance failure.

6. NET INCOME FROM COMMERCIAL AND SERVICE INVESTMENTS TO NET REVENUE STREAM

- 6.1 The Council's income from commercial and service investments as a proportion of its net revenue stream has been and is expected to be as indicated below.

	2024/25 actual (£)	2025/26 forecast (£)	2026/27 forecast (£)	2027/28 budget (£)
Total net income from service and commercial investments	237,992	363,365	521,937	529,234
Proportion of net revenue stream	1.42%	2.20%	3.03%	3.20%

7. PROPORTION OF FINANCING COST TO NET REVENUE STREAM

- 7.1 Although capital expenditure is not charged directly to the revenue budget, interest payable on loans and MRP are charged to revenue.
- 7.2 The net annual charge is known as financing costs, this is compared to the net revenue stream i.e., the amount funded from Council Tax, Business Rate, and general government grants.

ANNEX B
NON-TREASURY MANAGEMENT PRUDENTIAL INDICATORS

	2024/25 actual (£)	2025/26 forecast (£)	2026/27 budget (£)	2027/28 budget (£)
Financing costs (£)	11,233	14,000	35,000	32,000
Proportion of net revenue stream	0.10%	0.08%	0.25%	0.25%

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Council name	COTSWOLD DISTRICT COUNCIL
Name and date of Committee	CABINET – 09 APRIL 2026
Subject	STRATEGIC RISK REGISTER
Wards affected	All
Accountable member	Councillor Mike Every, Leader of the Council Email: mike.every@cotswold.gov.uk
Accountable officer	David Stanley, Deputy Chief Executive and Section 151 Officer Email: david.stanley@cotswold.gov.uk
Report author	David Stanley, Deputy Chief Executive and Section 151 Officer Email: david.stanley@cotswold.gov.uk
Summary/Purpose	The report sets out the current Strategic Risk Register for the Council.
Annexes	Annex A – Strategic Risk Register
Recommendation(s)	That Cabinet resolves to: 1. Review and note the Strategic Risk Register and mitigation measures.
Corporate priorities	All
Key Decision	NO
Exempt	NO
Consultees/ Consultation	Corporate Leadership Team, Leader of the Council, Cabinet Member for Finance



1. EXECUTIVE SUMMARY

- 1.1** This report sets out the Strategic Risk Register for Cotswold District Council which has been reviewed by the Corporate Leadership Team (“CLT”) during Q4 of the financial year.
- 1.2** The risks set out in Annex A of the report represent provide an update of the authority’s strategic risks and the risk management work being undertaken; to assist the committee in fulfilling their obligations to periodically review the authority’s Corporate Risk Register and to consider the effectiveness of the council’s risk management arrangements.

2. RISK MANAGEMENT STRATEGY

- 2.1** The Audit and Governance Committee is the Committee of the Council charged with approving the Risk Management Strategy, reviewing risk management reports and making recommendations to Cabinet. The committee previously considered the Risk and Opportunity Management Policy at their meeting on 27 May 2025.
- 2.2** The strategy sets the Council’s approach to risk management including defining what is Risk Management, our risk appetite as a council, definitions, roles, and responsibilities, and how risk management is embedded across the organisation.
- 2.3** As reported to Audit and Governance Committee at their meeting on 09 April 2026, no changes have been made to the since the previous review in May 2025.
- 2.4** The Council’s risk appetite level is Cautious, although this can change on a risk-to-risk basis. It is willing to consider all potential options but with well evaluated risks and learning from experience. The risk appetites considered in the policy are shown below for information.



Averse	Cautious	Creative and Aware	Eager
<ul style="list-style-type: none">• Safe Business delivery options with low risks limited reward• Reluctant to take action given uncertainty	<ul style="list-style-type: none">• Safe delivery of options that have a medium degree of risk and potential for reward• Tight corporate control over change	<ul style="list-style-type: none">• Willing to consider all potential options that are most likely to result in success• Well evaluated risk taking• Learns from experience	<ul style="list-style-type: none">• Eager to be creative and innovative• Higher rewards despite inherent risk• Willing to accept significant loss• Actions when results are unknown

- 2.5** Accepted best practice is for risk management to be reported to members on a regular basis.
- 2.6** External Audit, as part of the annual assessment of the Council's arrangements for securing economy, efficiency and effectiveness (Value for Money) have recommended that the frequency of the review of the strategic risk register should be quarterly.
- 2.7** The Council's constitution sets out the role of Audit and Governance Committee includes "Monitoring the arrangements for the identification, monitoring and control of strategic and operational risk within the Council" and "consider summaries of specific risk management reports, quarterly."
- 2.8** Members should view this review in response to the recommendation, and it is proposed that the strategic risk register is included in the work programme for the committee with a quarterly review frequency.
- 2.9** As an additional measure, the strategic risk register will be included in the wider quarterly performance reporting to Cabinet from Q3 2025/26.



3. STRATEGIC RISK REGISTER

3.1 In assessing risk, the Council utilises a 5x5 matrix (as shown below) with a score given to the Initial Risk and the Residual Risk (Current Risk)

Likelihood	5	5	10	15	20	25
	4	4	8	12	16	20
	3	3	6	9	12	15
	2	2	4	6	8	10
	1	1	2	3	4	5
		1	2	3	4	5
		Impact				

3.2 The strategic risks facing the Council are set out in Annex A and are considered the risks that could impact the successful achievement of the Council's long-term core objectives, priorities, reputation, and outcomes. These risks are classed as strategic as these are no able to be managed at service level.

3.3 There are 15 risks on the Strategic Risk register with 2 new risks since the previous register was considered by the committee at their meeting on 04 December 2025. A new risk covering **Fraud and Corruption** has been included and a service risk has been escalated from the Finance service risk register covering the risk of **PCI/DSS Compliance**.

3.4 The final column of the risk register indicates the Direction of Travel since the previous register.

3.5 The risks are summarised below for the purposes of this report, but members are encouraged to review Annex A.

- 1 risk scored 16 (Red) – Local Plan (previously scored 12)



- 3 risks scored 15 (Red) – Cyber Security, Health and Safety Compliance (unchanged). Civil Contingency (previously scored 10).
- 1 risk scored 12 (Amber) – Financial Sustainability.
- 9 risks scored 9 (Amber) – Procurement, Contractor Failure, Corporate Plan delivery (no change). Compliance GDPR/Data breach, Staff recruitment and retention, Service Standards (LGR impact), Democratic resilience (all increased in score)
- 1 risk scored 6 (Green) – Staff capacity (LGR workload).

	Impact		Likelihood	TOTAL
Total	52.00		46.00	160.00
Average	3.47		3.07	10.67
Previous Total	48.00		39.00	132.00
Previous Average	3.43		2.79	9.43
Change in Total	4.00		7.00	28.00
Change in Average	0.04		0.28	1.24

3.6 Further controls, mitigation, or contingency is detailed for each risk set out in Annex A with follow-up action where appropriate.

4. FINANCIAL IMPLICATIONS

4.1 There are no financial implications arising directly from this report.

5. LEGAL IMPLICATIONS

5.1 There are no legal implications arising directly from this report.



6. RISK ASSESSMENT

- 6.1** If the Council's governance arrangements are weak then Council is at risk of failing to safeguard the use of public funds. In turn this would lead to poor external assessments, damaging the reputation of the Council.

7. EQUALITIES IMPACT

- 7.1** An equalities impact assessment is not required for this report.

8. CLIMATE AND ECOLOGICAL EMERGENCIES IMPLICATIONS

- 8.1** There are no climate or ecological emergency implications arising directly from this report.

9. BACKGROUND PAPERS

- 9.1** None.

(END)

ID	Description of risk / opportunity	Owner	Initial Risk				Residual Risk (current)					Change in residual risk since previous review	Date of Review	Days since last review	Control, Mitigation or Contingency	Follow on Action (if required)	Risk Acceptance Level	Impact on or from Partner Authorities	Status: Open, Hold, or Closed	Direction of Travel since previous review	
			Impact category	Impact score	Likelihood category	Likelihood score	Score	Impact category	Impact score	Likelihood category	Likelihood score										Score
CDC_SRR_252601	Financial Sustainability The Council is unable to set a balanced budget for the forthcoming financial year (2027/28)	Deputy Chief Executive & Section 151 Officer	Major	4	Probable	4	16	Major	4	Possible	3	12	0	10-Mar-2026	15	3-year funding settlement - more certainty Experienced and qualified Team LGR Backfill in place Awareness of the Budget Gap in 2026 MTFS Current Savings and Transformation Plan Reserves and Balances - adequate Quarterly Financial Performance reports to Cabinet & O&S Financial Implications on every report Engagement with Cabinet member and Informal Cabinet	Development of ABW (Hierarchy) 2026/27 quarterly reporting External Auditor VfM judgement Transformation Plan - ABW Internal Audit to plan for audit of Budget Setting Process Review of MTFS post year end (June/July 2026) Engagement with Ubico/Publica prior to end of Q1 on expectations for 2027/28	Risk Reduction	<i>Risk to Partner Authorities but under control</i>	Open	↔
CDC_SRR_252613	Procurement The Council does not undertake procurement activities in accordance with the Contract Rules and/or incurs expenditure in relation to services/works that has not been authorised in accordance with the Financial Procedure Rules.	Deputy Chief Executive & Section 151 Officer	Major	4	Probable	4	16	Moderate	3	Possible	3	9	0	10-Mar-2026	15	Procurement Act 2023 (effective from 24/02/2025) with updated Contract Rules adopted in the constitution. Procurement Action Plan in place with additional mitigation measures. Procurement Toolkit available on intranet site. Procurement Training for Council staff delivered November 2025 and February 2026 Only authorised officers to undertake procurement Senior Procurement Business Partner to escalate any procurement concerns directly to CLT Review of TOR for Commissioning and Procurement Board	Mandatory Member Briefing on Procurement - 18 March 2026 Procurement Action Plan review to Audit & Governance Committee - April 2026 Internal Audit Plan 2026/27 - follow-up Quarterly review at Audit & Governance Committee and Cabinet from January 2026 with next report April 2026 ABW "Purchase to Pay" enhancement for CDC Q1 2026/27	Risk Reduction	<i>Risk to Partner Authorities but under control</i>	Open	↔
CDC_SRR_252602	Contractor Failure - Contract Management The Council does not effectively manage contracts with major suppliers and results in a failure to deliver services Major contractor unable to deliver service levels due to external pressures - Ubico expansion (Wiltshire), provision of new Waste Fleet vehicles	Deputy Chief Executive & Section 151 Officer	Major	4	Possible	3	12	Moderate	3	Possible	3	9	0	10-Mar-2026	15	Ubico & Publica - Teckal companies which CDC is a shareholder Publica - Shareholder Forum and Operational Forum (CDC Chair for 12 months from October 2025) Freedom - Leisure Contract manager (LC) Ubico - Waste & Recycling contract management (PJ) KPIs being developed with clear reporting framework to Cabinet & O&S on a quarterly basis Freedom - quarterly performance meetings with Freedom/Cabinet Member/Officers	Dun & Bradstreet alerts - follow up on how this is managed/communicated CDC to improve client-side management of key stakeholders Fortnightly review meetings - Head of Waste, s151 on Fleet replacement	Risk Reduction	<i>No impact</i>	Open	↔

ID	Description of risk / opportunity	Owner	Initial Risk				Residual Risk (current)				Change in residual risk since previous review	Date of Review	Days since last review	Control, Mitigation or Contingency	Follow on Action (if required)	Risk Acceptance Level	Impact on or from Partner Authorities	Status: Open, Hold, or Closed	Direction of Travel since previous review		
			Impact category	Impact score	Likelihood category	Likelihood score	Score	Impact category	Impact score	Likelihood category										Likelihood score	Score
CDC_SRR_252603	Compliance - Health & Safety Risk of death or injury to service users/staff due to breach of H&S information	Chief Executive	Extreme	5	Possible	3	15	Extreme	5	Possible	3	15	0	11-Mar-2026	14	H&S Team, policy Risk assessments in place H&S Board minutes standing item on CLT (quarterly)	Full set of H&S procedures to be developed and implemented All inspections relating to assets (e.g. Legionella) are recorded on the Council's asset management system with quarterly reporting to H&S Board/CLT Review of H&S Board TOR	Risk Avoidance	No impact	Open	↔
CDC_SRR_252604	Compliance - GDPR/Data Breach The Council does not have adequate internal controls around the management of its data resulting in a data breach	Chief Executive	Major	4	Probable	4	16	Moderate	3	Possible	3	9	1	11-Mar-2026	14	Data Protection Officer Training (mandatory) DP policies ICT Acceptable use policy Nominated SIRO Reporting of data breaches and near misses Cabinet member responsible for data governance	Annual report to the Cabinet member on data governance Internal Audit review follow and addressing the issues as raised in the IA Plan Mandatory Training from March 2026 to be completed by 30/04/2026	Risk Avoidance	No impact	Open	↑
CDC_SRR_252605	Staff Inability to recruit and retain suitably qualified and experienced staff to deliver services	Chief Executive	Major	4	Possible	3	12	Moderate	3	Possible	3	9	3	11-Mar-2026	14	Vacancy Management process Authority to Fill process Market Supplements, Flexible working, employee benefits (Medicash etc) Ability to bring in Agency Staff Shared agreements with other Councils Trainee roles/apprenticeships Approach to Learning & Development - Professional Learning Positive Workplace culture - People & Culture Strategy Appraisals - 2026/27 appraisals to be set no later than June 2026	CT Developing a framework for Training & Development Publica - partnership working with FODDC and WODC Consideration of mutual aid policy across Gloucestershire Review of secondment agreements to ensure mitigation measures are effective Retention Strategy to be considered by Cabinet in April 2026 Staff Survey results and follow-up actions All JDs to be reviewed by August 2026 Training Budget adequate	Risk Acceptance & Retention	Publica Risk	Open	↑

ID	Description of risk / opportunity	Owner	Initial Risk				Residual Risk (current)					Change in residual risk since previous review	Date of Review	Days since last review	Control, Mitigation or Contingency	Follow on Action (if required)	Risk Acceptance Level	Impact on or from Partner Authorities	Status: Open, Hold, or Closed	Direction of Travel since previous review	
			Impact category	Impact score	Likelihood category	Likelihood score	Score	Impact category	Impact score	Likelihood category	Likelihood score										Score
CDC_SRR_252606	Service Standards LGR risk inability to maintain BAU and support the Council and/or residents due to insufficient staff capacity (time spent on LGR)	Chief Executive	Moderate	3	Possible	3	9	Moderate	3	Possible	3	9	3	11-Mar-2026	14	Some services delivered by a partner organisation (Ubico, Publica) Wellbeing strategy and other employee benefits to support staff Capacity Fund to support delivery of BAU (CLT) - backfill may be an option Managing members and expectations through ongoing communication and briefings on Corporate Plan and service standards Retention Strategy LGR Transition budget funds 50% of Programme Leads to contribute towards backfill costs. whilst maintaining a robust process Where a vacancy arises - flexible approach to recruitment including backfill/act-up etc (case by case basis)	s151 Ensure Capacity Fund is adequate to support Council until 31/03/2028 2025/26 Outturn to identify additional balance for reserve Identification of single points of failure	Risk Acceptance & Retention	Risk to Partner Authorities but under control	Open	↑
CDC_SRR_252607	LGR Risk (staff unable to contribute/burnout) Inability to support the Council and Residents in the transition from District to Unitary Council	Chief Executive	Moderate	3	Possible	3	9	Minor	2	Possible	3	6	0	11-Mar-2026	14	Some services delivered by a partner organisation (Ubico, Publica) Wellbeing strategy and other employee benefits to support staff Capacity Fund to support delivery of BAU (CLT) - backfill may be an option Managing members and expectations through ongoing communication and briefings on Corporate Plan and service standards Realistic/Deliverable CP and SP within the resources available	s151 Ensure Capacity Fund is adequate to support Council until 31/03/2028 2025/26 Outturn to identify additional balance for reserve Identification of single points of failure	Risk Reduction	Risk to Partner Authorities but under control	Open	↔
CDC_SRR_252608	Local Plan The Council is not able to adopt the Local Plan in 2027 leading to unsustainable piecemeal developments which do not provide infrastructure	Director of Communities & Place	Major	4	Probable	4	16	Major	4	Probable	4	16	4	11-Mar-2026	14	Local Plan Oversight Board LP Project Management Leader and Deputy Leader commitment to deliver Review of Planning Services structures and resources Earmarked Reserve (£1m) + Grant funding (£0.230m) Additional £0.130m allocated to reserve February 2026 MTFS	s151 Ensure reserve funding is adequate to support Plan delivery Reg 19 Date Updated Project Plan lead by Interim Head of Policy Planning & Infrastructure - experienced leader s151 to review total resources required to deliver updated project plan	Risk Reduction	Risk to Partner Authorities but under control	Open	↑
CDC_SRR_252609	Corporate Plan Inability to deliver the priorities as set out in the Corporate Plan leading to reputation risk to the Council	Chief Executive	Moderate	3	Probable	4	12	Moderate	3	Possible	3	9	0	11-Mar-2026	14	Corporate Plan refresh adopted September 2025 with realistic and deliverable targets Quarterly Performance reporting on CP Actions Staff clear on responsibilities and accountabilities through appraisals Service plans - Golden thread and embeds CP in the Council	Review of CP Actions on an annual basis to ensure actions match resources and can be delivered within timeframe of LA Service Plans being reviewed/refreshed and updated for 2026/27 to ensure delivery of the CP. SP has to be signed-off by CAB member	Risk Reduction	Risk to Partner Authorities but under control	Open	↔

ID	Description of risk / opportunity	Owner	Initial Risk				Residual Risk (current)					Change in residual risk since previous review	Date of Review	Days since last review	Control, Mitigation or Contingency	Follow on Action (if required)	Risk Acceptance Level	Impact on or from Partner Authorities	Status: Open, Hold, or Closed	Direction of Travel since previous review	
			Impact category	Impact score	Likelihood category	Likelihood score	Score	Impact category	Impact score	Likelihood category	Likelihood score										Score
CDC_SRR_252610	Civil Contingency/Major Event The Council is not adequately prepared to deal with a major Civil Contingency leading to harm to life	Chief Executive	Extreme	5	Possible	3	15	Extreme	5	Possible	3	15	5	11-Mar-2026	14	BCP Plans Emergency Planning Training and Development of those involved in response (Gold etc) Publica process on emergency planning/rota Operation Pegasus/Mighty Oak etc - part of the 'live event/exercise'	CLT to review key service BCPs such as Finance - include as item on CLT Forward Plan Q4 2025/26 BIAs by end of March plus additional timetable Member of Glos LRF Exec - all had GOLD training/refresher training Involved in planning for significant/major events across Glos	Risk Reduction	Risk to Partner Authorities but under control	Open	↑
CDC_SRR_252611	Cyber Attack The Council is inadequately prepared for a cyber attack (e.g. ransomware) leading to Council systems being unavailable and inability to deliver services	Chief Executive	Extreme	5	Possible	3	15	Extreme	5	Possible	3	15	0	11-Mar-2026	14	Team Ability to cooperate	Regular briefings to CLT from service on state of cyber readiness, training etc	Risk Reduction	Risk to Partner Authorities but under control	Open	↔
CDC_SRR_252612	Resilience - Democracy Elected members do not agree to extending their term of office beyond May 2027 leading to an inability of the Council to make decisions (not being quorate, elections) Elected members that may be a Shadow Authority member could be unable to support District Council	Director of Governance & Development	Moderate	3	Possible	3	9	Moderate	3	Possible	3	9	3	11-Mar-2026	14	Ensure adequate staffing resource in Elections & Dem Services	Understand nature of final 11 months prior to vesting day and how member vacancies are covered Keeping members updated on LGR and other issues to ensure they can manage ward-based case work etc	Risk Reduction	Risk to Partner Authorities but under control	Open	↑
CDC_SRR_252613	Fraud & Corruption Risk If the Council does not have adequate controls, checks and mitigation measures in place when commissioning and procuring goods, works and services, there is a risk of fraud and / or corruption which may impact on cost, reputation and services. If the Council does not have adequate controls, checks and mitigation measures in place to prevent and detect fraud, bribery and corruption, there is a risk of financial loss and reputational impact.	Deputy Chief Executive & Section 151 Officer	Major	4	Probable	4	16	Moderate	3	Possible	3	9	0	11-Mar-2026	14	Counter Fraud and Enforcement Unit (CFEU) in place to manage Fraud and Corruption and ensure that the Council and its employees understand the risks and have controls, checks and measures in place to mitigate this activity. CFEU report to the Council's Audit and Governance Committee. Employees receive regular training. Work plans are developed annually to include prevention activities, proactive drives and resource to investigate reactive referrals. Work plans include a focus on high risk areas as identified nationally or through the partnership workstreams. CFEU test controls to ensure fit for purpose	CFEU currently developing service specific risk registers for fraud to further improve awareness and controls. Fraud Risk Strategy under review and Fraud Response Plan to be drafted. Any changes to processes / controls will be monitored / managed for any services which may transition from Publica to direct Council delivery.	Risk Reduction	Risk to Partner Authorities but under control	Open	↔
FIN_2627_SRR006	PCI DSS Compliance Council may not be fully compliant with PCI DSS which may lead to data breach Fines and investigatory costs from regulator Lack of understanding of PCI DSS options Lack of knowledge and skills across IT, Finance to implement changes that mitigate		Moderate	3	Probable	4	12	Moderate	3	Possible	3	9		18-Mar-2026	7	Council is aware and has chosen not to be fully compliant - additional processing fee is paid but no further mitigation is in place Project is progressing with QSA engagement	Council takes further steps to improve compliance as part of wider ABW enhancements	Risk Reduction	Risk to Partner Authorities but under control	Open	NEW

ID	Description of risk / opportunity	Owner	Initial Risk					Residual Risk (current)					Change in residual risk since previous review	Date of Review	Days since last review	Control, Mitigation or Contingency	Follow on Action (if required)	Risk Acceptance Level	Impact on or from Partner Authorities	Status: Open, Hold, or Closed	Direction of Travel since previous review
			Impact category	Impact score	Likelihood category	Likelihood score	Score	Impact category	Impact score	Likelihood category	Likelihood score	Score									

	Impact	Likelihood	TOTAL
Total	52.00	46.00	160.00
Average	3.47	3.07	10.67
Previous Total	48.00	39.00	132.00
Previous Average	3.43	2.79	9.43
Change in Total	4.00	7.00	28.00
Change in Average	0.04	0.28	1.24

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Council name	COTSWOLD DISTRICT COUNCIL
Name and date of Committee	CABINET – 16 APRIL 2026
Subject	DISCRETIONARY RATE RELIEF POLICY
Wards affected	All
Accountable member	Councillor Patrick Coleman – Cabinet Member for Finance Email: Patrick.Coleman@cotswold.gov.uk
Accountable officer	Frank Wilson – Managing Director, Publica Email: frank.wilson@cotswold.gov.uk
Report Author	Mandy Fathers – Business Manager for Environmental, Welfare and Revenues Email: mandy.fathers@cotswold.gov.uk
Summary/Purpose	To consider and approve amendments to the Discretionary Rate Relief Policy
Annexes	Annex A – Discretionary Rate Relief Policy Annex B – Examples of Reliefs
Recommendation(s)	That Cabinet resolves to: 1) Approve the amendments to the Discretionary Rate Relief Policy as detailed within the report 2) Delegate to the Chief Finance Officer, in consultation with the Cabinet Member for Finance, any future amendments to the Policy in respect of Electric Vehicle Charging Points and Electric Vehicle Forecourts.
Corporate priorities	<ul style="list-style-type: none"> • Delivering Good Services • Supporting the Economy
Key Decision	NO
Exempt	NO
Consultees/	Council Leader, Cabinet Member for Finance, Chief Executive and



Consultation	Deputy Chief Executive, Chief Accountant and Deputy S151 Officer, Director of Governance and Development, Director of Communities and Place, Head of Legal Services, Assistant Director, Managing Director (Publica)
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1. EXECUTIVE SUMMARY

- 1.1** To consider proposed changes to the Discretionary Rate Relief Policy following recent government announcements and to note the policy to underpin these schemes, as appended to this report.

2. BACKGROUND

- 2.1** The Local Government Finance Act 1988 and subsequent legislation require the Council to grant mandatory relief for premises occupied by charities and similar organisations that own or occupy them wholly or mainly for charitable purposes. Likewise, certain premises situated within a rural settlement area are eligible for mandatory relief. Powers have also been granted under the Localism Act 2011, which allow for the granting of discretionary rate relief to any premises where the Council feels the granting of such relief would be of benefit to the local community.
- 2.2** Whilst the Council is obliged to grant relief to premises, which fall within the mandatory category, the Council also has powers to grant discretionary relief and reductions to ratepayers, subject to certain criteria being met.

3. MAIN POINTS

- 3.1** The Council already has a Discretionary Rate Relief Policy (the 'Policy'), which, following recent announcements from Government in respect of new reliefs, has been reviewed.
- 3.2** In the case of the new reliefs, some guidance has been issued by central government outlining actions expected to be taken by local authorities. The amended Policy for the granting of Discretionary Rate Relief includes government guidance where appropriate but also looks to target discretionary relief in line with the Council's visions and priorities.
- 3.3** Addendum 2, of the Policy has been included, which details the new relief for Pubs and Live Music Venues.
- 3.4** Addendum 3, of the Policy has been included, which details the new Supporting Small Business relief.



3.5 From 1 April 2026, a new 10 years 100% business rate relief will also be introduced for standalone electric vehicle (EV) charging points and EV-only forecourts. The guidance for this has not yet been published. However, when this has been published, the Policy will be updated to reflect this.

4. FINANCIAL IMPLICATIONS

4.1 All rate relief is accounted for within the Collection Fund. Most discretionary rate relief is funded by Section 31 grant provided by Central Government. From 1 April 2026, Section 31 grant will also be accounted for within the Collection Fund.

4.2 For 2026/27 to 2028/29, the Government will, in line with the eligibility criteria set out in Addendum 2 and 3, reimburse the Council with additional Section 31 Grant for using its discretionary relief powers under section 47 of the Local Government Finance Act 1988 to grant Pubs and Live Music Venues Relief and 2026 Support Small Business Relief.

4.3 In addition to funded discretionary reliefs, Councils can also provide 'unfunded' relief for charitable occupation, non-profit making bodies, community amateur sports clubs and small rural businesses. The loss of business rates revenue associated with such relief is shared as follows:

- Central Government 50%
- County Council 10%
- District Council 40%

4.4 The loss of business rates revenue associated with unfunded discretionary rate relief in 2026/27 is estimated to be £0.070m of which the Council's share is £0.028m. This has been incorporated within the approved budget and Medium-Term Financial Strategy agreed by Council in February 2026.

5. LEGAL IMPLICATIONS

5.1 Section 47 of the Local Government Finance Act 1988 gives powers to local councils to grant discretionary rate relief for the full or a part of the amount due. Subsequent legislation in the Localism Act 2011 has extended these powers to allow wider granting of local discretionary relief.

6. RISK ASSESSMENT

6.1 There is a risk that if government increases the rate retention percentage of 50% (of which 10% is for the County Council) to 75% (as previously anticipated) the financial impact on the local Councils would increase significantly.



7. EQUALITIES IMPACT

7.1 These are no specific equality issues, but the Council will consider more favourably applications for discretionary relief from organisations that work in the district with vulnerable, disadvantaged, or underrepresented groups.

8. CLIMATE AND ECOLOGICAL EMERGENCIES IMPLICATIONS

8.1 The Government is implementing significant business rate reliefs to accelerate the installation of EV charging infrastructure, with a 100%, 10-year relief on business rates for eligible EV charging points and EV-only forecourts starting from 1 April 2026 with the aim to make EV charging more affordable and accessible, thereby accelerating the transition to electric vehicles and supporting the reduction of greenhouse gas emissions.

9. ALTERNATIVE OPTIONS

9.1 None

10. BACKGROUND PAPERS

10.1 None

(END)



COTSWOLD

District Council

DISCRETIONARY RATE RELIEF POLICY 2026

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1 Introduction

- 1.1 The Council understands the importance that local businesses and organisations play in achieving its priorities and ensuring its communities and businesses are able to develop and thrive within the district.
- 1.2 Councils have the power to award relief from the payment of Non-Domestic Rates (Business Rates) to organisations and businesses that meet certain criteria. Public funds are not, however, unlimited and a proportion of any relief granted is met by the Council Taxpayers of the district. The Council therefore needs to be satisfied that money invested this way will be repaid in economic and/or community benefit.
- 1.3 The power for granting discretionary rate relief is provided for by Section 47 of the Local Government Finance Act 1988. This has been amended by subsequent legislation which gives wider powers to grant discretionary relief to any ratepayer where the authority feels the granting of such relief would benefit the local community.
- 1.4 This policy is designed to provide guidance to officers and ratepayers on the application of Discretionary Rate Relief.
- 1.5 The policy covers the following types of discretionary rate relief:
 - Charitable rate relief
 - Community Amateur Sports Clubs (CASCs)
 - Rate relief for not-for-profit organisations
 - Hardship relief
 - Temporary relief for partly occupied properties
 - Local discounts and incentives
- 1.6 This policy document outlines the various areas of local discretion and the Council's approach to the various reliefs. This approach has regard to the impact:
 - of granting discretionary relief on the Council's wider financial position and the impact on its Council Taxpayers;
 - on the organisations and businesses that currently receive or may apply for relief in the future;
 - on the residents of Cotswold District Council if relief is awarded and the economic benefits to the district.

2 **The Discretionary Rate Relief Scheme**

2.1 Discretionary rate relief (DRR) is granted in accordance with Section 43 of the Local Government Finances Act 1988 and Sections 47 and 49 of the Local Government Finance Act 1988 as amended by the Localism Act 2011 and the Non-Domestic Rating Act 2023.

2.2 Section 69 of the Localism Act amended section 47 of the Local Government Finance Act 1988 to allow billing authorities to fund their own local discounts. The Council can grant business rate discounts and incentives as it sees fit within the limits of primary legislation and the rules on State Aid. These powers can be used to encourage new business and investment as well as support local shops or services to the community.

2.3 The legislation requires the Council to maintain a DRR scheme to award relief of up to 100% to certain organisations and businesses which operate within specified criteria. This includes:

- Charitable bodies already in receipt of mandatory relief of 80%. The Council has a discretion to 'top-up' this relief to 100% of the business rates due
- Registered community amateur sports clubs (CASCs) already in receipt of mandatory relief of 80%
- Non-profit making organisations – the Council has discretion to grant relief of up to 100% of the business rates due
- DRR for 'other rural businesses'
- Relief on the grounds of hardship
- Relief for part-occupied premises
- Local discounts and incentives

2.4 In making decisions the Council may:

- Grant relief up to a maximum of 100% of the business rates due;
- or
- Refuse any application for relief

2.5 In the majority of cases discretionary relief will be granted for a period of two financial years. Successful applications will be sent a letter confirming the new award of discretionary relief. This letter will explain the period of award and the date it will end.

3 **The application process**

3.1 Applications for relief must be made by completing an application form and submitting the relevant supporting information which includes:

- Details of the applicant’s main purposes and objectives (where applicable) as set out in a written constitution, a memorandum of association or membership rules;
 - A full set of audited accounts relating to the last two financial years. Where audited accounts are not available projections should be provided instead, along with bank statements;
 - Details of how the organisation meets the relevant criteria detailed in these guidelines
- 3.2 Any applications which are made without the supporting documentation will be subject to a decision being made solely on the information that is available at the time of the decision.
- 3.3 As a guide, to be eligible for discretionary rate relief a charity/organisation must not have enough unrestricted funds/reserves to continue to operate for more than 12 months unless a business plan exists detailing how these additional funds are to be used to benefit the local community.
- 3.4 In exceptional cases, discretionary rate relief will be granted to organisations which have enough financial resources in unrestricted funds/reserves to continue to operate for more than 12 months. This may include charities and community organisations which require a large amount of available resources to sustain the service they deliver to the community. In such cases the application must be able to demonstrate it offers a service which the local residents depend on and which they would be unlikely to find elsewhere in the district.
- 3.5 The Council will aim to make a decision within one calendar month of the application and supporting information being received. Decisions on the award of discretionary rate relief will be made by the Cabinet Member with responsibility for Finance in consultation with the Chief Finance Officer. Ratepayers are required to continue to pay business rates whilst their application is being considered. Failure to make payment will result in the Council pursuing collection through the usual enforcement procedures which could result in Court action.
- 3.6 There is no statutory right of appeal against a decision other than by way of judicial review. An unsuccessful applicant may make a request for the Council to review its decision, but only where:
- 1) Additional information relevant to the application that was not made available at the time the decision was made becomes available.
 - 2) There are grounds to believe the application or supporting information was not interpreted correctly at the time the decision was made.
- 3.7 A request for a review must be made within one calendar month of notification of the decision and must set out the reasons for the request and any supporting information. Cases will be reviewed by Cabinet.

3.8 In line with the model of Business Rate Retentions Scheme in operation since 2013, the cost of awarding discretionary relief is apportioned as follows:

- 50% will be funded by Central Government
- 40% will be funded by Cotswold District Council
- 10% will be funded by Gloucestershire County Council

3.9 Any decision regarding rate relief will be communicated to the applicant in writing.

3.10 Where the decision is a refusal the reasons for refusal will be provided in the letter.

3.11 A review of the guidelines will be undertaken every 3 years in line with the Valuation Office Agency's revaluation cycle, or if business rates legislation is amended, or as necessary to ensure it complies with current legislation and Cotswold District Council's priorities.

3.12 The ratepayer must inform the Council immediately of any changes which may affect their eligibility for relief.

4 Charitable Rate Relief

4.1 Mandatory Rate Relief of 80% is granted to charities where:

- The ratepayer is a charity or the trustee of a charity; and
- The property is wholly or mainly used for charitable purposes (including charity shops where the goods sold are mainly donated and the proceeds are used for the purposes of the charity).

4.2 Registration under the Charities Act 1993 is conclusive evidence of charitable status. Bodies which are exempt charities are also eligible for mandatory relief.

4.3 In cases where a charity is in receipt of mandatory relief of 80% the Council has direction to grant up to 20% discretionary relief (top-up). The Council will consider applications for discretionary relief from charities based on their own merits on a case-by-case basis. The principal consideration in awarding relief is that it is in the best interests of the residents and Council Taxpayers of Cotswold District to do so and it produces a local benefit as the Council must contribute to the cost of each award.

4.4 Each case will be assessed on its own merits, but generally top-up discretionary relief will only be awarded to the following charities or excepted organisations:

- Scouts, guides, cadets and other clubs and organisations for young people;

- Organisations providing support in the form of advice, employment training and counselling;
- Community schemes including those providing support for those over retirement age, community transport and volunteer organisations;
- Charitable supporting clubs;
- Armed Forces veterans' associations;
- Locally based leisure and cultural organisations.

4.5 The following general exclusions will apply:

- 'Top-up' relief will only be granted to local charities (defined as those set up with the sole purpose of assisting residents of Cotswold District and whose main office is situated within the district);
- Unless a special case for financial hardship can be proved 'top-up' to national charities (including charity shops) will not be awarded;
- 'Top-up' relief for Housing Associations will not be granted.

5 **Registered Community Amateur Sports Clubs (CASCs)**

5.1 Registered Community Amateur Sports clubs (CASCs) are entitled to 80% mandatory relief. The Council will consider applications for discretionary rate 'top-up' from CASCs based on their own merits on an application-by-application basis.

5.2 The Council will consider applications that can demonstrate:

- The contribution the organisation makes to Cotswold District;
- The club is open to the whole community, and its membership fees are not excessive;
- It is a non-profit organisation;
- Evidence that every effort is made by the organisation to encourage open membership from groups such as young people, disabled persons, and those over retirement age;
- Schemes of education and training are provided particularly for young people, disabled persons, women and those over retirement age;
- How the CASC supports and links into the Council's priorities.

5.3 Applications will only be considered where the club has an open access policy. If a club accepts members who have reached a certain standard, rather than seeking to promote the attainment of excellence by developing sporting aptitude, it does not fulfil the requirements.

5.4 Although clubs should be open to all without discrimination, single sex clubs may be permitted where such restrictions are a genuine result of physical restraint (such as

changing room facilities) or the requirement of the sport. In such cases the application will be required to provide evidence of these factors.

- 5.5 It should be noted that sports clubs which run a bar are unlikely to be awarded discretionary rate relief if their main purpose is the sale of food and drink. If the sale of food and drink by the organisation aids the overall operation and development of the organisation meaning it achieves its objectives this is permissible if the principal objectives of the organisation meet the eligibility criteria detailed in 5.2. If the bar makes a profit this relief must be reinvested to help the organisation meet its principal objectives. Financial information will be required to evidence any profit and its use.

6 Rate relief for not-for-profit organisations

- 6.1 Not-for-profit organisations which are not classed as registered charities or CASCs can apply for discretionary rate relief of up to 100%. Such organisations include those which are philanthropic, religious, concerned with education or social welfare, science, literature, the fine arts, recreation or are otherwise beneficial to the community.

- 6.2 The Council will consider applications from organisations which can demonstrate:

- Its activities support at least one of the Council's priorities;
- It promotes its service for the benefit of Cotswold District residents;
- Membership of the organisation is open to all members of the community;
- The facilities of the organisation are to be made available, where practicable, to other organisations and groups;
- The organisation operates in such a way that it does not discriminate against any section of the community;
- It is not established or conducted for the primary purpose of profit.

- 6.3 If the organisation applying for discretionary rate relief requires membership or any entry fee the Council will consider whether:

- Membership is open to everyone regardless of race, ethnicity, sex, marital or parental status, sexual orientation, creed, disability, age, religious affiliation or political belief;
- The subscription or fee is set at a level which is not prohibitively high and is affordable by most sections of the community;
- Fee reductions are offered to certain groups, for example the under 18s and over 60s;
- Membership is encouraged from the unemployed, young people not in employment, education or training, those of retirement age and people with disabilities.

6.4 Where the applicant organisation requires membership, at least 50% of members should reside within the Cotswold District and evidence of this will be required.

6.5 The organisation must provide a copy of their constitution and copies of the latest two years of audited annual accounts where available.

7 **Hardship Relief**

7.1 The Council has discretion under Section 49 of the Local Government Finance Act 1988 to grant relief of up to 100% where hardship is demonstrated. Hardship relief can only be considered if it would be reasonable to do so in the interests of Council Taxpayers in general.

7.2 Hardship relief will be awarded where the business is suffering from unexpected hardship which is outside of the normal risks associated with business. Reduction or remission of business rates on the grounds of hardship will only be made in exceptional circumstances.

7.3 Hardship relief is granted at the discretion of the Council which can reduce or remit the amount of business rates due provided it is satisfied that:

- The ratepayer would sustain hardship if it did not do so; and
- It is reasonable to do so having regard to the interests of its council taxpayers,

7.4 The following factors will be considered in assessing the application:

- The test of hardship needs not to be confined strictly to financial hardship. All relevant factors affecting the ability of the business to meet its rates liability will be considered.
- The interests of Council Taxpayers in the area may be wider than direct financial interests. Examples of this include where employment prospects in the area would be worsened by a company going out of business or the amenities of the area being reduced.
- The ratepayer must provide evidence of hardship, for example a severe loss or marked decline in trade compared to similar periods in previous years.
- The ratepayer must be able to show evidence of its viability for the future which is two years for these purposes.

7.5 A business will not be considered for hardship relief in the following circumstances:

- Where the business is profitable;
- Where the business has experienced a minor loss in trade;

- Where the drawings/remuneration of directors, partnerships or sole traders are of an amount not deemed reasonable by the Council;
- Where the business is new and hardship relief is being requested to fund the initial progression of the business;
- Where the property is empty;
- Where similar goods or services are already being provided in the locality or within a reasonable distance.

7.6 Prior to any award being made the business is expected to act to mitigate or alleviate their hardship by:

- Considering other options such as renegotiating with creditors;
- Contacting the Council's Business Advice officer;
- Having in place a business plan to address the hardship.

7.7 Applications for hardship relief shall be regarded as a last resort and will only be accepted after consideration of any other forms of rate relief for which the applicant may be eligible for.

7.8 The period and amount of any award will be determined on a case-by-case basis but may be up to 100% of business rates liability.

7.9 Hardship relief will only be granted for short periods of time and usually up to a maximum of 6 months.

8 Properties partly occupied for a temporary period

8.1 There may be times where a property is only partly occupied for a short period of time. This may be due to a business relocating to a new property. In certain circumstances, the Council may use its discretion to award partly occupied relief which is also known as Section 44a (Section 44a of the Local Government Finance Act 1988).

8.2 In these circumstances the Council may request that the Valuation Office Agency apportions the rateable value of the property between occupied and unoccupied parts.

8.3 Section 44a relief may be awarded in the following circumstances:

- Where the occupied and unoccupied parts of the property can easily be separately assessed; or
- Where there are short term practical or financial difficulties in either occupying or vacating the premises.

- 8.4 The part occupation must be for a temporary period only. Rate relief will not be awarded where the partial occupation is due to the normal day to day operation of the business, for example where a warehouse has despatched a large order and no longer needs to store stock.
- 8.5 For the purposes of this policy a period of up to 6 months will be considered temporary. Periods of time exceeding 6 months will be treated as a permanent change and will not be eligible for partly occupied relief.
- 8.6 Relief will not be awarded where it appears to the Council that part of the property is being kept empty for the sole purpose of claiming rate relief.
- 8.7 Prior to an award being made, a visit to the premises will be made by a Council Officer to establish the exact area of the property that is empty. The application must be supported by a plan of the property which clearly marks the boundary of the occupied and unoccupied parts. This plan will be given to the Valuation Office Agency to apportion the rateable value. Further visits may be made to the property throughout the duration of the relief to establish that the property is still partly occupied.
- 8.8 Part occupied relief will end if one of the following applies:
- The financial year comes to an end;
 - The end of the award;
 - Where part or all the unoccupied parts become occupied;
 - Where the whole of the property becomes unoccupied;
 - Where the liability for the property changes.

9 **State Aid**

- 9.1 From 1 January 2021, the United Kingdom left the EU Single Market and Customs Union and is no longer subject to the De Minimis Regulations.
- 9.2 The Government has introduced its own rules regarding state subsidies. Discretionary rate relief is considered a subsidy under the rules, but the matters that must be considered all relate to the effect of the subsidy on international trade. In making an award the public body making it must consider:
- effects on international trade;
 - the subsidy is prohibited under the World Trading organisation (WTO) rules;
 - are in line with those agreed by the UK –EU Cooperation and Trade Agreement;
 - are unlikely to trigger a dispute under WTO trade rules.
 -
- 9.3 It is unlikely that an award of discretionary rate relief would fall counter to these rules.

10 **Complaints and Appeals**

- 10.1 Any customer who feels that they have not been correctly dealt with can use the Customer Feedback procedure to make a complaint.
- 10.2 Rating Law does not allow for a ratepayer to appeal a decision by the Council on discretionary rate relief. However, in the interest of natural justice and in keeping with customer care practise and principles of open government, this policy provides a mechanism for review of any decision.
- 10.3 If a ratepayer is unhappy with the decision made, full details should be submitted, in writing to the Council within one calendar month of notification of the decision. Any review will be considered by Cabinet.

11 **Fraud**

- 11.1 The Council is committed to the prevention and detection of fraud and the protection of public funds. Cases of suspected fraud will be referred to the Counter Fraud and Enforcement Unit (CFEU) for investigations which may result in clawback of payments made and/or further action being taken against an individual.

Appendix A

Category of Ratepayer	Mandatory Relief	Discretionary Relief
Charities	80%	Up to 20%
Registered Community Amateur Sports Clubs (CASCs)	80%	Up to 20%
Non-Profit Organisations	Nil	Cases considered on individual merit
Hardship Relief	Nil	Cases considered on individual merit
Partly Occupied Hereditament	Nil	Cases considered on individual merit

Addendum 1

Rural Rate Relief

Rural Rate Relief is available for post offices, village shops, petrol filling stations and public houses subject to rateable value restrictions, where they are the only business of that type in the rural settlement.

The government announced in the Autumn Statement on 23 November 2016 that the relief would increase from 50% to 100% from 1 April 2017.

Eligibility Criteria

Properties that will benefit from the relief will be hereditaments that are located in a rural settlement with a population of less than 3,000 and are either: -

- a) The sole general store, food shop or post office with a rateable value of up to £8,500 or;
- b) The sole public house or petrol filling station with a rateable value of up to £12,500

The Districts Rural Settlement List is reviewed annually and designates settlements within a rural area which have a population of 3,000 or less.

Amount of Rural Rate Relief available

Anyone who is entitled to mandatory Rural Rate Relief will be eligible for the increased level of discount of 100% off their business rate liability.

Recalculation of Rural Rate Relief

The amount of relief awarded will be recalculated in the event of a change in circumstances, including a backdated change to the rateable value of the hereditament, whether arising during the year in question or during a later year.

Addendum 2

Relief for Pubs and Live Music Venues

From 27 January 2026, the Government announced that eligible pubs and live music events in England will receive a 15% reduction on their business rates bills for the 2026/27 financial year.

Hereditaments that meet the eligibility criteria for pubs and live music venues relief will be occupied hereditaments which meet all of the following conditions for the chargeable day:

- a) They are wholly or mainly used:
- As a pub
 - As a live music venue

Pubs

A pub is considered to mean a hereditament where the following criteria apply:

- Is open to the general public
- Allows free entry other than when occasional entertainment is provided
- Allows drinking without requiring food to be consumed
- Permits drinks to be purchased at a bar

For these purposes, the meaning of a pub does not include:

- Restaurants, cafes, nightclubs, snack bars
- Hotels, guesthouses, boarding houses
- Sporting venues
- Festival sites, theatres, cinemas
- Museums, exhibition halls
- Casinos

The proposed exclusions in the list above is not intended to be exhaustive and it will be for the Council to determine those cases where eligibility is unclear.

Where eligibility is unclear, the Council should also consider broader factors in its assessment – i.e. in meeting the stated intent of the policy that it demonstrates the characteristics that would lead it to be classified as a pub by the natural meaning of the word. For example: being owned and operated by a brewery, establishments that are open to wide sections of local communities and practically operate as a pub for that local community e.g. working men's club.

Live Music Venues

A live music venue is considered to mean a hereditament that:

- a) Is wholly or mainly used for the performance of live music for the purposes of entertaining an audience
- b) Can be used for other activities but only if those other activities:
 - Are ancillary or incidental to the performance of live music (e.g. the sale of food or drink to audience members)
 - Do not affect the primary use of the premises for the performance of live music (e.g. because the activities are infrequent such as use of the venue as a polling station or fortnightly community event)

Hereditaments are not a live music venue for the purpose of this relief if the property is wholly or mainly used as a nightclub or a theatre, for the purposes of the Town and County Planning (Use Classes) Order 1987 (as amended).

How much relief will be available

The eligibility for the relief and the relief itself will be assessed and calculated on a daily basis. The following formula will be used to determine the amount of relief to be granted for a chargeable day for a particular hereditament in the 2026/27 financial year:

- a) Amount of relief to be granted = $V \times 0.15$ (i.e. 15% relief) where:
 - V is the daily charge for the hereditament for the chargeable day after the application of any mandatory relief and certain other discretionary reliefs in line with guidance.

The relief is not subject to any cap or the Minimal Financial Assistance limit in Subsidy Control.

Addendum 3

Supporting Small Business Relief

At the Autumn Budget 2025 the Chancellor announce the 2026 Supporting Small Business Relief scheme (SSBR) for the years 2026/27 to 2028/29. This will cap bill increases at £800 per year or the relevant caps with transitional relief, whichever is the greatest for any business losing eligibility for certain reliefs, including Small Business Rate Relief and Rural Rate Relief, and 40% Retail, Hospitality and Leisure Relief at the 2026 Revaluation. SSBR was first introduced at the 2017 revaluation to support ratepayers facing bill increases greater than the Transition Relief caps due to loss of Small Business Rate Relief and Rural Rate Relief.

The purpose of this policy is to specify how the Council will operate its discretionary powers in the Local Government Finance Act 1988, section 47, and to indicate the factors the Council will consider when deciding if SSBR can be awarded.

Cotswold District Council will automatically calculate and award the relief to those properties that meet the qualifying criteria and have seen a large increase in their bills as a result of losing some or all of their:

- Small Business Rate Relief or Rural Rate Relief,
- 40% Retail, Hospitality and Leisure Relief (RHL), and/or
- 2023 Support Small Business Relief.

Charities and Community Amateur Sports Clubs, who are already entitled to 80% mandatory, are not eligible for the 2026 SSBR.

To support eligible ratepayer, the 2026 SSBR will ensure that the increase in the bills of these ratepayers is limited to £800 per year or the relevant caps within transitional relief, whichever is the greater.

For those ratepayers receiving 2023 SSBR on 31 March 2026, including those also receiving Small Business Rate Relief, Rural Rate Relief and/or RHL, any eligibility for 2026 SSBR will end of 31 March 2027. All other eligible ratepayers remain in 2026 SSBR for either 3 years or until they reach the bill they would have paid without the scheme. A change of ratepayers will not affect eligibility for the Supporting Small Business scheme, but eligibility will be lost if the property falls vacant or becomes occupied by a charity or Community Amateur Sports Club.

There is no second property test for eligibility for the 2026 SSBR scheme. However, those ratepayers who during 2025/26 lost entitlement to Small Business Rate Relief, because they failed the second property test but have, under the rules for Small Business Rate Relief, been given a 12-month period of grace before their relief ended (or from 27 November 2025, 3 years), can continue on the 2026 SSBR scheme for the remainder of their period of grace.

Small businesses rate relief or rural rate relief should not be applied to further reduce the bill if in receipt of SSBR. For example:

- A non-RHL ratepayer eligible for small business rate relief whose rateable value has increased from £3,000 (paying £0 in 2025/26) to £14,000 would be paying the following in 2026/27 before the 2026 SSBR:
 - I. Bill before reliefs (including 1p Transitional Relief Supplement): £6,188
 - II. Bill after transitional relief: £1,572
 - III. Bill after small business rate relief: £1,048
- After 2026 SSBR the bill for 2026/27 would be reduced to £800. No further small business rate relief should be applied and no addition for transition relief supplement is made to the bill within SSBR.

The same principle applies to properties for which a Section 44A certificate has been granted (apportionment of rateable values for partly occupied properties). The presence of a section 44A certificate should not further reduce the bill found under 2026 SSBR.

All other discretionary reliefs, including those funded by section 31 grants, should be considered after the application of 2026 SSBR.

Subsidy Control

The 2026 SSBR is likely to amount to a subsidy. Therefore, any relief provided by local authorities under the scheme will need to comply with the UK's domestic and international subsidy control obligations which contains guidance and information for the new UK subsidy control regime.

To the extent that a local authority is seeking to provide relief that falls below the Minimal Financial Assistance (MFA) thresholds, the subsidy control Act allows an economic actor, (e.g. a holding company and its subsidiaries) to receive up to £315,000 in a three-year period, consisting of the 2026/27 and the previous two financial years. MFA subsidies cumulate with each other and with other subsidies that fall within the category of 'Minimal or Services of Public Economic Interest (SPEI) financial assistance'. Any other subsidies claimed under the Small Amounts of Financial Assistance limit of the Trade and Cooperation Agreement should be counted under the £315,000 allowance.

In those cases where it is clear to the local authority that the ratepayer is likely to breach the cash cap of the MFA limit then the Council will automatically withhold the relief.

Recalculation of Reliefs

As with other reliefs, the amount of SSBR awarded should be recalculated in the event of a change of circumstances. This could include, for example, a backdated change to the rateable value or to the hereditament. This change of circumstances could arise during the year in question or during a later year.

Splits and Mergers

Hereditaments will be eligible for 2026 SSBR where they have:

- a) Come into existence because of the circumstances described in paragraph 1 of the 2026 Transitional Relief Regulations, and,
- b) Where one of the hereditaments from which the new hereditament was formed in whole or in part was for the day immediately before the creation day eligible for 2026 SSBR.

The Ministry of Housing, Communities and Local Government (MHCLG) will fund local authorities to apply a chargeable amount under section 47 of Local Government Finance Act 1988 found in accordance with the following principle:

- That the protection offered by 2026 SSBR (that the bill will not rise by more than £800 per annum, or the transitional relief caps whichever is the greater) will continue to apply in principle to that part of the newly created hereditament which was immediately before the creation day in 2026 SSBR, and,
- That increases (or reductions) in overall rateable value arising from the split or merger are not subject to the protection of 2026 SSBR.

Detailed guidance for operation of the 2026 Support Small Business Relief (2026 SSBR)

Detailed guidance for the scheme, including day 1 eligibility rules, ceasing of eligibility for the scheme rules and the calculation of chargeable amounts under the scheme, are contained in the MHCLG guidance document at: <https://www.gov.uk/government/publications/business-rates-relief-2026-supporting-small-business-relief-local-authority-guidance>

How payments will be made

All relief awarded will be credited to the ratepayer's Business Rates account.

Overpayments

The Council will recover all overpayments of SSBR through the ratepayer's Business Rates account.

Right of Appeal

If a ratepayer is aggrieved by a decision made under this policy, you must write and tell us why you think the decision is wrong.

Your case will be considered by someone who has not been involved in the original determination. They will write to tell you what has happened, normally within 21 days of reconsidering your appeal.

Fraud

The Council is committed to the prevention and detection of fraud and the protection of public funds. A ratepayer who tries to fraudulently apply for SSBR by falsely declaring their circumstances or providing a false statement will be referred to the Counter Fraud and Enforcement Unit (CFEU) for investigation which may result criminal proceedings being instigated.

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Annex B

Example 1 – Small Business Rate Relief (SBR)

Small Office: From 1 April 2026 the rateable value (RV) has increased to £13,500 (it was previously below £12,000 and therefore received 100% relief)

Relief applied at 1% for every £30 of RV above £12,000 (in this example $1,500/30 = 50$ and so 50%)

Calculation:

Gross rates: $RV (13,500) \times \text{Multiplier } (0.432 + 1p \text{ supplement}) = £5,967$

$£5,967 - 50\% \text{ relief} = £2,983.50$ (charge for 2026/27)

Example 2 – Supporting Small Business Relief

Café: From 1 April 2026 the RV has increased to £18,500 (it was previously below £12,000 and therefore received 100% relief)

Calculation:

Gross rates: $RV (18,500) \times \text{Multiplier } (0.382) = £7,067$

The Government caps the increase and for 2026 the bill will only increase by a maximum of £800 (or higher depending on the specific cap, which in this example would be 5%)

5% of £7,067 = £353.35, so for this example the £800 cap (being the higher) will be applied.

Charge for 2026/27 = £800

Example 3

A café with an RV of £8600 and full SBR has taken on a Kiosk to sell additional coffee from 30 November 2025. The Kiosk had an RV of £2800 (below the threshold to prevent the removal of SBR on the first property) but the RV has risen to £3000 from 1 April 2026.

The old regulations would have required the Café to surrender the SBR on the main café a year after taking on the second property and to continue paying on Kiosk.

Because the owner has taken on the Kiosk after the autumn statement, he can keep SBR on the first property for 3 years until 30 November 2028 and will only need to continue paying on the Kiosk, which would be $\text{£}2,800 \times 0.432 + 1\text{p supplement}$) = $\text{£}1,237.60$



Council name	COTSWOLD DISTRICT COUNCIL
Name and date of Committee	CABINET – 16 APRIL 2026
Subject	PUBLICA BUSINESS PLAN 2026-2028
Wards affected	All
Accountable member	Mike Evely - Leader of the Council Email: mike.evely@cotswold.gov.uk
Accountable officer	Jane Portman, Chief Executive Email: Jane.Portman@cotswold.gov.uk
Report author	Frank Wilson – Managing Director, Publica Email: Frank.Wilson@cotswold.gov.uk
Summary/Purpose	To consider the Draft Publica Business Plan 2026-28, produced by the Publica Board in consultation with Directors and Shareholders, and to recommend that the Leader (as Shareholder Representative) approves the plan.
Annexes	Annex A – Draft Publica Business Plan 2026-28
Recommendation(s)	That Cabinet resolves to: <ol style="list-style-type: none"> 1. Endorse the Publica Business Plan 2026-2028 2. Ask the Leader, as shareholder representative, to recommend its adoption to the Board
Corporate priorities	<ul style="list-style-type: none"> • Preparing for the Future • Delivering Good Services
Key Decision	NO
Exempt	NO
Consultees/ Consultation	Publica Shareholder Forum Officer Transition Board Publica Board



1. EXECUTIVE SUMMARY

- 1.1** Publica's Articles of Association has twelve reserved matters for Shareholder Council approval, these ensure they retain the necessary control over their teckal company. Adopting or amending the Business Plan is one of the reserved matters.
- 1.2** The Business Plan proposed by the Publica Board spans a two-year time frame to tie in with the Local Government Reorganisation (LGR) deadline and runs up to Vesting Day of any new councils on 31 March 2028.
- 1.3** Whilst the exact shape and size of the new unitary councils are not yet known, the clear focus of the Business Plan is how Publica, along with its shareholding councils, will prepare its people and its services for LGR – the most significant change to the local government landscape in a generation.

2. BUSINESS PLAN 2026-28

- 2.1** The title of the 2025-26 Business Plan was 'Preparing for the Future' and the plan set out how we would complete the second phase of the Publica Review, transitioning phase 2 services back to council direct employment. The plan also considered the emerging landscape post the announcement of Local Government Reorganisation (LGR) and how we would consider the impact / opportunities for Publica and council services.
- 2.2** A clear steer was received from shareholders that council services must continue to be delivered to meet the priorities set out in their Council Plans and therefore the 2025-26 plan gave a focus on this and set out some of the key delivery priorities for Publica in respect of Customer Services, ICT and Cyber Security.
- 2.3** Looking forward from now it feels that the principles set out in the current Business Plan continue to apply – completion of the Publica Review followed by a significant period of preparation as we seek to collectively implement the final decisions of government on unitary structures. Of course, this cannot come at the expense of the services we currently deliver to our communities and delivery of priorities set out by our councils in an ever-shortening timeframe.



- 2.4** For the reasons set out above it seems appropriate to produce a two-year business plan which aligns to Unitary 'Vesting Day' – the size and shape of councils and future of Publica, as yet, remain undetermined.
- 2.5** This approach of a two-year plan allows us to clearly define to our employees what is in front of us in the run up to reorganisation – Year 1 is all about preparation whilst Year 2 moves into an implementation phase as shadow councils are formed.
- 2.6** The draft plan is attached at Annex A. The key changes that are covered include:-
- Updated Foreword – reflecting the challenge facing Publica and the councils as we prepare our teams for Local Government Reorganisation whilst not yet knowing what this means in detail
 - Governance changes – how we now work with councils after the Publica Review
 - Priorities – how we are delivering on council priorities and maintaining service standards
 - Service Offering – Key services that Publica delivers on behalf of the councils – this was felt important post the Publica Review so it is clear which services we deliver now
 - Preparing for the Future – Year 1 and Year 2 priorities focused on our people and delivering service reviews ready for LGR
 - Finances – 26/27 Budget and 3-year plan
- 2.7** The draft plan attached has been considered by Shareholder Forum and amendments requested have been made.

3. ALTERNATIVE OPTIONS

- 3.1** The Cabinet could determine not to approve the Business Plan and refer it back to the Board and Shareholder Forum.

4. FINANCIAL IMPLICATIONS

- 4.1** As part of the second phase of the Publica Transition it was agreed by all shareholders that the cost allocation model would be updated to reflect current



consumption of services by partners. The changes were approved by all shareholders in December 2025.

- 4.2** The revised financial implications of service provision set out in the Business Plan have been incorporated in the annual budget approved by Council in February 2026. Where changes in provision occur during the year these are subject to contract variations which are agreed between Publica and the council.

5. LEGAL IMPLICATIONS

- 5.1** Approval of the Business Plan is a requirement of the Members Agreement and is a reserved matter for shareholders.

6. RISK ASSESSMENT

- 6.1** There are no significant risks in respect of the adoption of the Business Plan. Failure to adopt the Business Plan would require further engagement with shareholder and the Publica Board.
- 6.2** The Business Plan sets out how Publica will de-risk from an employment perspective any future transition to new unitary councils.

7. EQUALITIES IMPACT

- 7.1** In carrying out the preparation for LGR Publica will follow its equality and diversity policies and ensure no disadvantage to any group of either employees or service users.

8. CLIMATE AND ECOLOGICAL EMERGENCIES IMPLICATIONS

- 8.1** As a silver accredited Carbon Literacy Employer, it will continue to ensure that the climate and ecological emergencies are considered as part of its operations.

9. BACKGROUND PAPERS

None

(END)



Business Plan 2026 to 2028

Preparing for the Future

PUBLICA

PUBLICA

I. Foreword



Frank Wilson
Interim Managing Director



Christine Gore
Chair of the Board

In 2026, local government in Gloucestershire and Oxfordshire stands on the cusp of the most significant change in a generation. In both counties the last year has involved the creation of business cases to meet central government's challenge to move to a standardisation of local government structures across the country. This 'unitarisation' of local government, merging county council and district council responsibilities, will impact all employees, councillors, residents and businesses within our partner council boundaries.

Change of this magnitude will inevitably impact the services Publica provides to its councils. Indeed, the councils, our shareholders, will cease to exist from April 2028 and will be replaced by new organisations. Establishing what this means for Publica, and therefore our employees, is critical over the next year so that we can provide a level of reassurance for them. Providing this clarity for the future will help us ensure that we can continue to deliver high quality services to our residents and businesses as we move through this period of significant change.

In 2025, submissions were made to the government which set out options for the future. For our shareholders this could mean that they will combine to become part of two or three councils in the future, which will be larger in scale and cover a broader range of responsibilities. The government anticipates making a final decision on what structures will look like in July 2026 with new councils going live on 1 April 2028.

Given the scale of transition required to establish new organisations (including elections in 2027), it is critical that the councils, with Publica playing its part, prepare for this new world. It is critical that we do not wait for the final decision but start preparation now – and we can confirm that it has already started.

The first year of this two-year business plan has a heavy focus on planning and preparing (where we can) for any changes. This will involve providing options for our shareholders to consider as they work with their partners across Gloucestershire and Oxfordshire in building future organisational plans. Whilst doing this, we will continue to make the case, where appropriate, for the shared delivery model that Publica demonstrates – a model that has delivered savings to our shareholders over the years at a level of almost twice the original business case.

The second year of the business plan will see both Publica and the councils move into delivery mode for the new councils – building the new organisations, establishing the infrastructure and supporting our people through this period of change.

Of course, in delivering all these changes for the future we cannot ignore the present, not only delivering great core services but also helping our councils deliver their legacy projects, ensuring residents are not disadvantaged by any future changes to structures, and ensuring the new councils get as clean a start as possible.

2. Introduction: The Publica Business Plan

Publica's Articles of Association have twelve reserved matters for shareholder council approval. This makes sure that they retain the necessary control over their 'Teckal' company. Adopting or amending the business plan is one of the reserved matters.

This business plan is for two years, reflecting the run up to local government reorganisation and the significant change that will bring. The main purpose of this plan is to:

- Continue the focus on delivering the shareholder councils' priorities and their legacies.
- Continue to deliver great, value for money services to residents and businesses on behalf of the councils.
- Recognise the need to balance continued provision of services whilst contributing to the significant work required to prepare for Local Government Reorganisation.
- Support and prepare our people and services for change as we build towards Local Government Reorganisation.



Our performance of key services across the year

BENEFITS

54,593



residents supported with applications

HOUSING

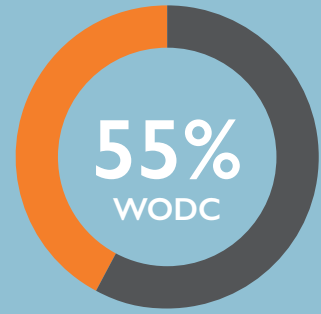
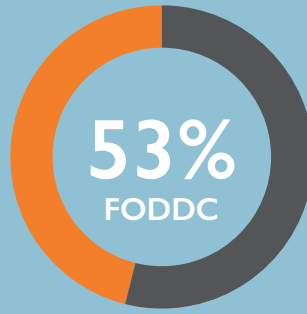
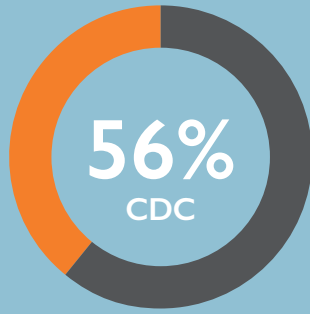


504

residents prevented from becoming homeless

WASTE

Our partnership delivers some of the best recycling rates nationally



£4.6M



cummulative savings from environmental services innovation programme

74,237



green licences sold

PEOPLE



130

Completed carbon literacy training

661

Staff supported through learning and development



CUSTOMER SERVICE

11%

Fewer phone calls



Over 185,000

Customer service cases opened

98%

of customers satisfied



REGULATORY



6,000

Planning applications validated



1,334

Food businesses inspected

3. The Publica Values

The Publica values will continue to help and guide us through the transition.

Authentic

We act genuinely and transparently. We do the right thing for our customers, our organisation and each other.

Modern

We are not set in our ways. We are constantly looking to find ways to innovate and do things smarter.

Flexible

We are agile - adapting how and what we do to meet the demands of our customers, our colleagues, our local communities and the needs of the modern world.

Thoughtful

We take pride in delivering a great service, taking the time to understand and care about the planet and the environment, as well as our customers and their needs.

Following both phases of transferring services from Publica, partner councils have introduced their own values and behaviours, developed collectively by both Publica and council employees.

Whilst each council may have subtly different values, these all overlap and complement our Publica values. We believe that all employees, regardless of their employer, should be happy to live by all the values that are agreed across the partnership.



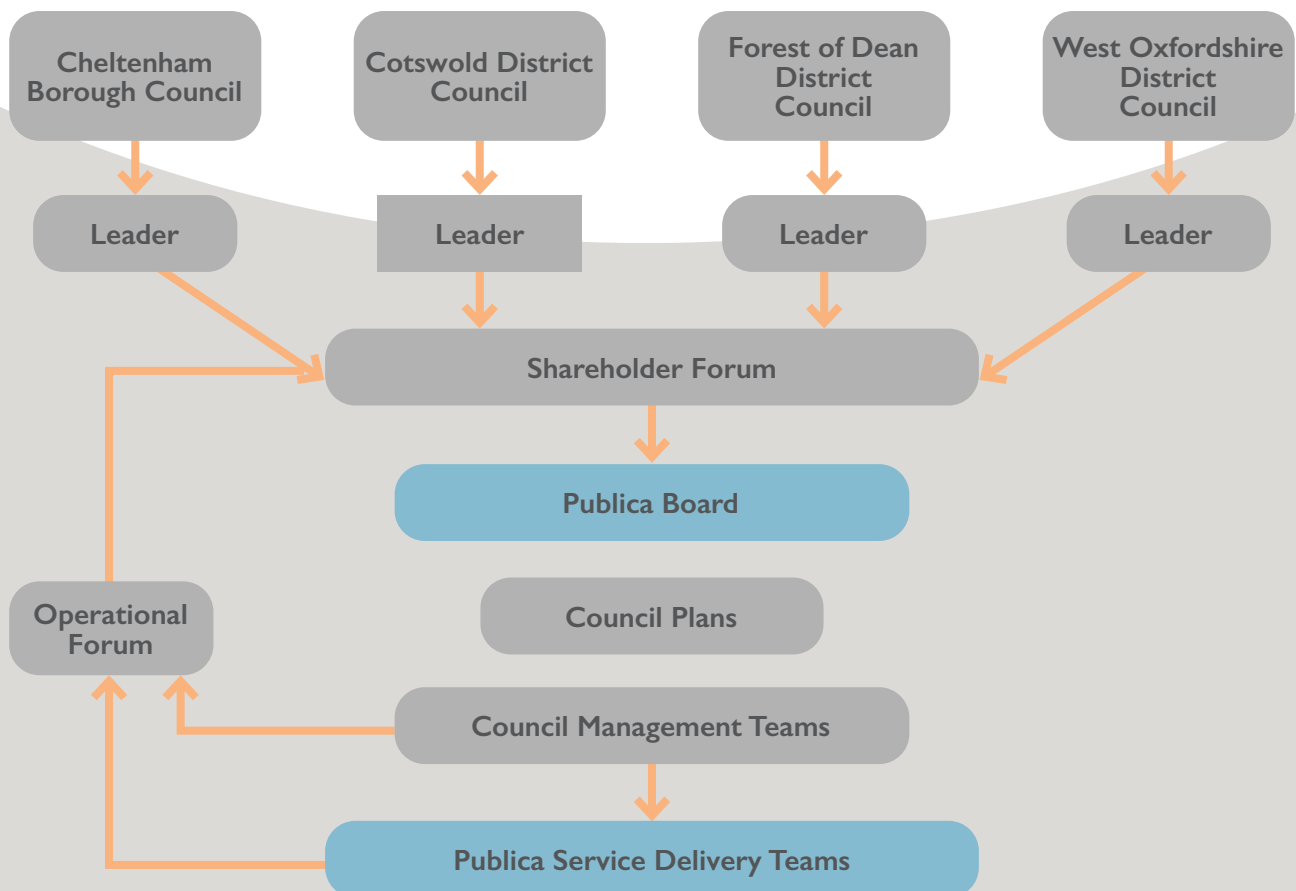
PUBLICA

4. Re-imagining Publica

Having successfully delivered the Publica Review, the services which now remain within Publica are those which are more traditionally delivered under shared service arrangements. This creates an opportunity as both Publica and the councils collectively face the new challenge of Local Government Reorganisation (LGR).

Following the transition of services, the councils are more focused on their role as commissioner of the services received from Publica and other strategic partners. Changes have been made to reshape the Publica Board and update governance arrangements including extending and simplifying service agreements, rejuvenating the Shareholder Forum, and introducing a new Operational Forum chaired by one of the Shareholder councils. The Publica Board now comprises of three executive directors and five non-executive directors, of which two are council officers collectively nominated by the shareholders.

A key focus of the Operational Forum through the life of this plan will be reviewing Publica performance and projects that will be delivered in the run up to LGR. The forum provides a platform for shareholders to explore our service performance and delivery in greater depth, complementing the current arrangements through council committees. The new governance structure is set out below.



5. Delivering council priorities and effective core services

Delivering council priorities

Shareholder councils have ambitious plans to deliver their local priorities. We are committed to delivering key projects with the shareholder councils, being flexible and agile to emerging priorities, and realising the benefits for local communities. Increasingly the focus will be on delivering legacy projects, which provide a lasting benefit for communities, in advance of the LGR transition.

The key projects that we will deliver for shareholder councils are as follows:

Communities and Economy

- Delivery of car parking and public convenience strategies to maximise the benefits these assets provide and ensure they are of good quality and meet the needs of local residents and visitors.
- Supporting local business and residents through review of Hackney Carriage and Private Hire policies.
- Supporting local communities to build their resilience so they can respond effectively to emergencies.

Housing and Wellbeing

- The Low Income Family Tracker (LIFT) project identifies residents that may be in financial hardship and need support. We have already supported residents to secure benefits with a lifetime impact of £421,000 and the next two years will build on the early success of the project.
- Supporting changes required for compliance with The Renters Rights Act including enforcing the new tenancy system and using strengthened enforcement powers through our regulatory teams in Housing and Environmental Health.
- Acquiring new properties to provide emergency accommodation in areas of high demand, to improve the living standards for those requiring support and reduce the costs for the councils.

Modern Services

- Three technology programmes, exploring AI, spatial data and improving the partnership ERP system.

- Tackling underperformance in key areas by embedding process redesign and continuous improvement so that services remain responsive, efficient, and fit for the future. This includes improving a number of frontline services delivered by Publica over the lifespan of this plan.
- Supporting improvements to our procurement processes and tools to enhance transparency, reduce financial risk, and ensure more efficient, compliant procurement activity. Strengthening financial control by ensuring all spending is pre-approved, reducing the risk of unauthorised or inaccurate payments.
- Providing well supported and managed placements for apprentices and T-Level students to support young people seeking employment in the districts and provide a pipeline of candidates for future vacancies.

Environment

- Supporting our business waste customers by helping them comply with Simpler Recycling requirements while making the process as straightforward as possible. Offering practical advice and responsive customer support to ensure businesses can manage their waste efficiently, reduce costs, and maximise environmental benefits.
- Digitising Food Health and Safety forms and strengthening document retention policies to reduce the associated environmental footprint, lowering waste and energy use and helping create a more sustainable and efficient service.
- Enhancing our environmental crime capabilities to tackle fly tipping incidents.

Our Core Service Offer

Customer services and the safe, secure technology that supports their delivery are the fundamental building blocks of everything Publica does. We believe that by designing simple, effective and value for money services, which are digitally enabled, we can ensure residents and businesses receive consistently good interactions

Customer Services

Delivering high quality, customer focused, services for residents is at the heart of everything Publica does. Customer needs and behaviours continue to change significantly, meaning the way in which we interact needs to continually evolve. Our promise to provide customers with prompt, high quality, easily accessible services remains as relevant as ever:

We have continually improved customer services to meet our strategic commitments to residents. This is borne out by the very high levels of customer satisfaction in relation to face-to-face and telephone interactions. As we continue to evolve, our work is focused on ensuring that customers have consistently good interactions throughout their entire journey with us.

Our current approach builds upon the successes in the front office but has a greater focus on back-office customer experience. This will provide more consistency for customers, reduce the need for repeat contacts, and provide a better overall experience by:

- Improving digital access with a focus on self-service
- Exploring automation of simpler tasks
- Optimising processes through redesign, to take advantage of modern technology.
- Make more data-led decisions
- Plan the workforce around the customer

Information and Communication Technology (ICT) Services and Cyber Security

Our technology and the teams that support it are the foundation of everything we deliver to support council services and residents. Continued investment by the councils has enabled us to do this safely and successfully. Our unified architecture across multiple organisations means that we can provide greater proportional value without increasing costs.

Every working day, our team enables around 1,800 people to log in and access the systems necessary for delivering council services. The ICT teams ensure that business systems remain accessible at all times from any location and to introduce new services and strengthen integration between business systems, residents and strategic partners.

The Cyber Security team leverages innovative technology, including AI and automation, to monitor and safeguard all of our operations, ensuring we are safe by design and default.

Over the coming years we will continue to evolve with three technology programmes designed to support the current and future needs of the councils. The programmes include projects such as laptop replacements, Cloud migrations of data and business systems, enabling existing systems with AI capabilities, implementing UK Government sponsored technologies, and implementing new data standards.

Just as our core Customer, ICT and Cyber support services form the basic building blocks underpinning service delivery, Publica also delivers a range of fundamental, front line, shared services that provide value to residents, businesses and communities. Some of the key services include:

Revenues

The service collects local taxation across 141,000 Council Tax accounts and almost 17,000 Business Rate accounts collecting around £280m in Council Tax and almost £100m in Business Rates per annum. Within this the service assesses the eligibility for discounts and exemptions for households and businesses and is responsible for the recovery of debts, up to and including representing the councils in court.

Benefits

A shared service team dealing with over 17,000 Housing Benefit and Council Tax Support claims. The service processes circa 65,000 changes per annum to these claims and provides vital, time critical, support to some of our most vulnerable residents. The team also delivers the Low Income Family Tracker campaigns which support struggling households.

Housing Allocations

This team manages a total waiting list of circa 5,500 housing applications. Operating a Choice Based Lettings system and working closely with registered housing providers and private landlords, the team help residents to take advantage of a broad range of housing options.

Homelessness

Supporting the most vulnerable members of our communities, the team seeks to prevent homelessness. Where this cannot be avoided they seek to secure suitable emergency accommodation and subsequently an appropriate and permanent home.

Environmental and Regulatory Services

This service has a broad scope, including Environmental Protection, Food Health and Safety, in addition to Licensing. Services ensure that land, air, water and noise pollution is effectively regulated, alongside housing and envirocrime enforcement. Teams ensure businesses operate safely and hygienically. The Licensing team review and regulate a wide variety of premises and activities, supporting license applicants to understand the boundaries of their license.

Service Support

A multi-purpose service providing support to many services within Publica and the councils, whilst also delivering key services such as Disabled Facilities Grants and planning administration.

Transactional Finance, Insurance and Procurement

The exchequer, accounts receivable, and accounts payable services manage the day to day transactional financial services for the councils. The insurance service manages the insurance contract for the four partner councils and Ubico, managing claims and premiums and liaising with the broker. The procurement team provides advice and guidance to all services on the commissioning and procurement of contracts for works and services, ensuring the partners remain compliant and achieve good value.

Paid for Products

Management of a range of commercial products that deliver over £5.6m revenue back to the councils, ranging from Green Waste licensing to grounds maintenance and bulky waste services.

Car Parking

Managing parking services across car parks owned and managed by three of our councils, they provide parking enforcement, management of Parking Charge Notices, issue of permits and management of income collection. They also manage Public Conveniences and the cleaning, cash collection and pay and display machines contracts that support these services.

Emergency Planning

Working with multi-agency partners this team supports locality duty officers, rest centre and coordination team managers through training and advice to ensure they can respond effectively in an emergency. They manage the preparation and testing of Business Impact Assessments and Business Continuity Plans reducing the risk of service disruption in the event of a challenge threatening normal operations.

Recruitment and Learning & Development

Providing a full end to end recruitment service for our shareholders and third-parties, and learning and development across the partnership.

HR & Payroll

Managing the full employee lifecycle from recruitment to payroll this team supports a number of our councils and third parties.

6. Preparing for the Future

Our shareholder councils will know the size and shape of the new unitary councils in the summer of 2026 and this will give some certainty to employees who will transfer to the new councils upon vesting in April 2028. The future of Publica will remain uncertain for a longer period and may not be clear until after the new shadow councils are formed.

A decision could include retention of Publica to provide services to the new councils or closing the company on or before vesting day. With links with Ubico, Publica already has a footprint which extends across the whole of Gloucestershire, and this will create opportunities for discussions as the new landscape emerges. However, Publica must prepare for all possible outcomes.

A key focus over the life of this business plan will be to implement people focused strategies to retain high quality people by preparing and supporting them in readiness for LGR.

To do this we will align services and people to the new unitary councils. Should the decision be made to close Publica, this work will ensure that people retained within Publica are treated fairly and their employment is protected, whilst also giving the opportunity to mitigate cost increases to councils.



Over the next two years we will deliver the following workstreams with shareholders:

Year 1

- Support the councils as they work towards the establishment of new unitary councils by being part of the LGR programmes for both Gloucestershire and Oxfordshire, bringing our skills and expertise to the benefit of the individual work programmes.
- Implement people focused strategies with the aim to retain high quality people by preparing for the future and providing support in readiness for LGR.
- Deliver in-depth reviews of our service provision to help understand the future options for the partnership, including the benefits, risks and costs of each option. Where there is an in-year change (where the service area moves back to the Council) this will be reported by the individual council through regular quarterly reporting. The table below sets out the programme of work to achieve this.

Description	FTE	Priority
Corporate Support	8.2	1
DFGs /Safeguarding/Refugees	7.7	1
Flood Defence and Land Drainage	6.0	1
Local Land Charges	2.9	1
Car Parks - Off Street	11.6	2
Homelessness	30.9	2
Human Resources	12.9	2
Environmental Regulatory Services (ERS)	30.1	2
Health & Safety	1.2	2
ICT	51.5	2
Housing and Welfare Benefits	23.1	3
Council Tax/NNDR Collection	26.1	3
Licensing	8.0	3
Reception/Customer Services	34.6	3
Payroll	4.0	3
Training Talent and Recruitment	8.5	3
Procurement	3.7	3
Insurances	2.0	3
Services Support Team	24.3	3
Finance, Transactional / Treasury / Creditors / Debtors	21.7	3
Resources Data Performance and Growth	14.0	3
Planning Validation- Service Management and Support	16.4	3

Year 2

- Agree the options for future service delivery with our shareholders and the shadow councils and then implement those outcomes ready for Vesting Day.
- Support the implementation of the new councils through the relevant workstreams including the transfer of any appropriate staff from the existing councils and Publica.

7. Finance and Risk

Publica was established by the shareholder councils in 2017 with a business case to deliver £2.3m of annual shared service savings through the company by 2028 with cumulative cash savings of £18m by the same date. Tracking of the savings post the Publica Review is now more difficult however, using the same principles established since 2017, the annual shared service savings have reached £4.1m and cumulative cash savings £30.6m if the proposed budget is delivered in 2026/27.

	2025/26 Approved Base	Movement	Revised 2025/26 Base	2026/27 Base
	£000s	£000s	£000s	£000s
Sales				
Contract Income	21,731	(2,681)	19,050	19,792
Direct Costs:				
Salaries (Inc. on-costs)	18,532	(1,918)	16,614	17,376
Agency Costs	30	0	30	30
Employee Transport and Travel	115	0	115	105
Other Staff costs	514	0	514	476
Gross Surplus	2,540	(763)	1,777	1,805
Administration Expenses	1,567	(635)	932	931
Operating Surplus	973	(128)	845	874
Net Interest (Payable)/ Receivable	76	0	76	91
Surplus	1,049	(128)	921	965
Tax	14	0	14	23
Contract Fee Refund	1,035	(128)	907	942
Retained Surplus	0	0	0	0

Three Year Forecast

This strategy extends beyond the timeframe for LGR implementation and therefore is very dependent upon decisions made in respect of Publica contracts as part of that implementation.

	2025/26 Base Year	2026/27 Year 1	2027/28 Year 2	2028/29 Year 3
	£000s	£000s	£000s	£000s
Sales				
Contract Income	19,050	19,792	20,397	21,016
Direct Costs:				
Salaries (Inc. on-costs)	16,614	17,376	17,897	18,434
Agency Costs	30	30	31	32
Employee Transport & Travel	115	105	108	111
Other Staff costs	514	476	490	505
Gross Surplus	1,777	1,805	1,871	1,934
Administration Expenses	932	931	959	988
Operating Surplus	845	874	912	946
Net Interest (Payable)/ Receivable	76	91	79	73
Surplus	921	965	991	1019
Tax	14	23	20	18
Contract Fee Refund	907	942	971	1,001
Retained Surplus	0	0	0	0

Risk Management

Publica maintains a strategic risk register which is considered regularly by its management team and the Audit and Risk Committee. This makes sure that we effectively manage the most critical risks facing Publica and its shareholders, whilst also continually scanning the horizon for emerging risks and opportunities. The key strategic risks for Publica are:

- Changes to the local government finance regime upon the shareholder councils financial standing
- Impact of Local Government Reorganisation on our shareholding councils and therefore Publica
- Recruitment and retention particularly in light of Local Government Reorganisation
- Continued risks in respect of cyber security

There remains an opportunity that any emerging unitary authorities may wish to adopt the 'Teckal' model of service provision particularly as Publica has an established track record of successfully bringing together services from multiple councils and creating a shared resilient and cost effective service. This could provide an opportunity for an expansion of service provision.

8. Performance Management Framework

Publica and the shareholder councils have made significant progress in becoming more data-driven and data-mature organisations, strengthening their ability to deliver modern, effective services for residents. Over the past year we have transformed our performance and improvement capabilities, building a seamless pathway from performance insight to enhanced service delivery.

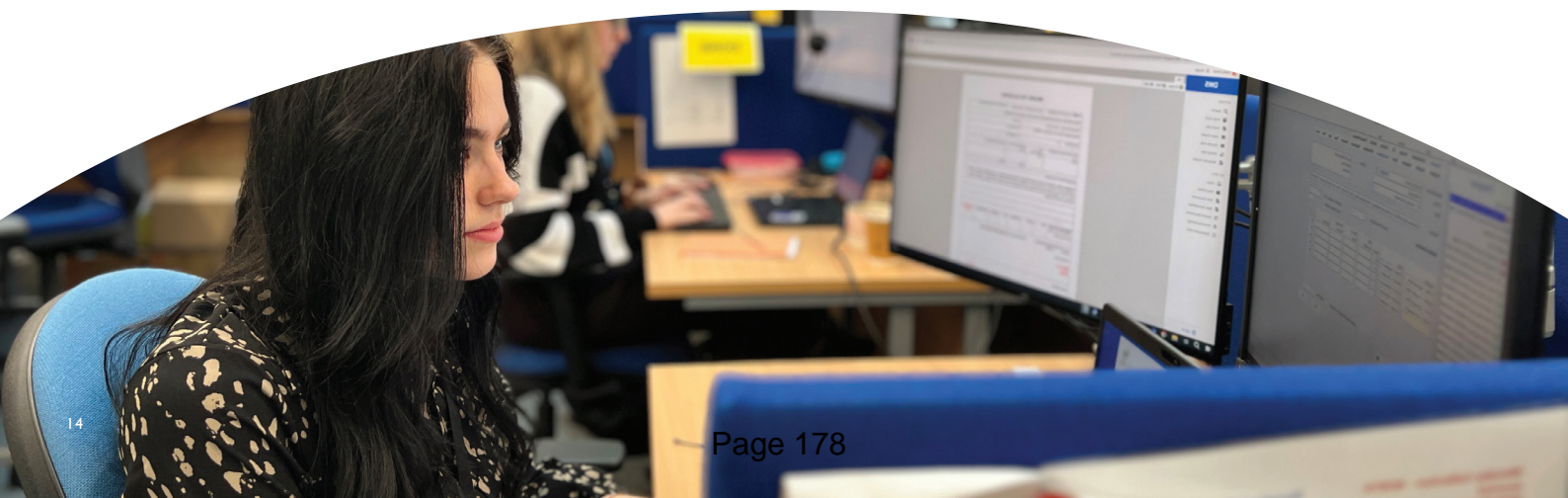
By ensuring that all partnership performance frameworks clearly highlight when performance is off-target at an early stage, we are able to trigger targeted interventions to support improvement and recovery.

At a practical level, strengthening our business partnering capability over the lifespan of this plan will build on existing work to embed a culture of insight, with managers and teams increasingly using data proactively to inform decisions.

As we move towards LGR, we are placing an increased emphasis on strengthening insight and performance across the full range of services delivered by Publica and the partnership. This will ensure that teams are fully supported to maintain high-quality delivery and that all services are handed over in a strong and stable position on Vesting Day. Our priority will be those services included within the corporate KPI suite, as these represent the areas of greatest impact for our residents and businesses.

The corporate KPI suite includes reporting on:

- Revenue Collection and Benefits Processing
- Customer Satisfaction
- Land Charge searches
- Long Term Empty Properties
- Housing and Homelessness
- Environmental investigation and enforcement
- High risks investigated within target timescales
- Customer contact (complaints, FOI, EIR etc.) responded to within target timescales
- Percentage of invoices paid within 30 days
- Server uptime and IT service request/incident response times
- Organisational Health including sickness, attrition and health and safety incidents.
- Financial Performance, payroll accuracy





PUBLICA



PUBLICA



Council name	COTSWOLD DISTRICT COUNCIL
Name and date of Committee	CABINET – 16 APRIL 2026
Subject	REVIEW OF PUBLICA GOVERNANCE AGREEMENT & EXTENSION OF SERVICE AGREEMENT
Wards affected	All.
Accountable member	Cllr Mike Evely, Leader of the Council Email: mike.evely@cotswold.gov.uk
Accountable officer	Angela Claridge, Director of Governance & Development (Monitoring Officer) Email: angela.claridge@cotswold.gov.uk
Report author	Angela Claridge, Director of Governance & Development (Monitoring Officer) Email: angela.claridge@cotswold.gov.uk
Summary/Purpose	<p>The purpose of this report is for the Cabinet to consider proposals for amendments and an extension to governance arrangements following the conclusion of the Publica Review. This includes the updating of service specifications, service agreements, the members agreement and articles of association.</p> <p>The report also seeks delegated authority to make any minor adjustments to the Publica specification in the run-up to Local Government Reorganisation should it become necessary.</p>
Annexes	None
Recommendation(s)	<p>That Cabinet resolves to:</p> <ol style="list-style-type: none"> 1. Approve in principle the changes to the governance agreements set out in section 3. 2. Delegate authority to the Chief Executive, in consultation with the Leader, to finalise and enact through appropriate legal documentation, the detailed changes to the



	<p>agreements, in line with the principles agreed.</p> <p>3. Delegate authority to the Chief Executive, in consultation with the Leader, to approve minor amendments to the scope of services delivered by Publica to Cotswold District Council in advance of Local Government Reorganisation.</p>
Corporate priorities	<ul style="list-style-type: none"> • Preparing for the Future • Delivering Good Services • Supporting Communities
Key Decision	Yes
Exempt	No
Consultees/ Consultation	<p>Publica Board</p> <p>Council Management Teams</p> <p>Shareholder Forum (Leaders)</p> <p>Publica Transition Legal Workstream (Monitoring Officers & Legal)</p>



1. EXECUTIVE SUMMARY

- 1.1** The arrangements for shared service provision within the Publica partnership have been subject to a significant level of change over the last two years as a consequence of the Publica Review. There has been significant change to the company board structure with new Non-Executive Directors appointed including council officer representation and a slimmed down Publica Executive structure reflecting the reduced service provision to partners.
- 1.2** The changes set out in this report provide for an updated set of governance arrangements to support the service changes post the Publica review, clarifying roles and responsibilities as well as revising service specifications to reflect current provision. The changes also provide both certainty and the necessary flexibility as we move towards Local Government Reorganisation (LGR).
- 1.3** The approved changes will be legally enacted most efficiently through deeds of variation to the original documentation (<https://publicagroup.uk/who-we-are/key-information/>) rather than requiring full replacement documentation, where possible, thereby minimising any legal costs.
- 1.4** The report seeks delegated authority for the Chief Executive, in consultation with the Leader, to implement any minor amendments to the service specification should these be expedient as we approach Local Government Reorganisation.

2. BACKGROUND

- 2.1** The governance documents that support the delivery of services by Publica were approved prior to its launch in 2017. These documents (found at <https://publicagroup.uk/who-we-are/key-information/>) outlined the arrangements for managing the company and its service delivery for all partners. For three of the partners (Cotswold, Forest of Dean and West Oxfordshire) this included three separate service specifications relating to Support Services, General Services and Commissioning. Cheltenham only took Support Services and as such, has one service specification. These service agreements all had different timelines associated with them.
- 2.2** The Publica Review has fundamentally changed the nature of the service offering from Publica to its shareholding councils such that three separate contracts are no longer necessary. Having paused any further significant changes to the Publica service offer prior to determining Publica's future as part of LGR, the shareholders



requested that Publica review and update the governance documents to reflect the current position in terms of service delivery and to prepare for LGR.

2.3 In recognition of the changing specifications since the commencement of the Publica Review, the partners have been operating on a range of side letters to accommodate these changes and indeed, expiring service agreements timelines. It was agreed that revising the agreements at this stage was sensible to provide certainty for councils and employees whilst retaining flexibility as we move towards LGR.

2.4 Cheltenham BC has recently extended its service agreement (not impacted by the Publica Review) until 31 October 2030, as accommodated for within the original agreements.

2.5 The key agreements that have proposed changes within this report are:

- Articles of Association
- Members Agreement
- Services Agreements
- Services Specifications.

3. SUMMARY OF THE MAIN CHANGES TO GOVERNANCE DOCUMENTS

3.1 The key changes required in the documents are set out below. These changes have been considered in detail by the Shareholder Forum where the council is represented by the Leader.

Articles of Association

3.2 Some very minor changes are proposed to largely reflect current practice:

- clarifying that annual distributions or surpluses are permitted and that this does not require prior shareholder approval
- removing reference to the dormant companies (now dissolved)
- removal of the requirement to annually renew the Chair of the Boards appointment (the three-year term remains unaltered as does the ability to remove the Chair within the term)

Members Agreement

3.3 Relatively minor changes are proposed reflecting current practice. It is proposed that these changes are enacted by a deed of variation.

- Clarifying that surpluses can be distributed annually



- Clarifying that members will fund the consequences of any decisions that they have made (as they did in respect of the Publica Review) subject to decision making unanimity
- Clarifying the timelines for the annual business plan reflecting a more appropriate timeline that matches council and Publica budget processes

Services Agreement

- 3.4** The Services Agreement has more significant changes specifically to deal with the merging of three separate specifications into one. There is now one specification of 'services', removing Commissioning Services and General Services. There is also an amendment to create a single agreement end date of 31 October 2030. This aligns with the date used by Cheltenham which provides continuity should any new unitary authority want to continue with the model or undertake a phased shutdown, whilst retaining flexibility for termination earlier, if necessary, in the run up to reorganisation.
- 3.5** There has also been some general updating to pick up changes in legislation such as General Data Protection Regulation and changes to clauses to reflect how the agreement works in practice rather than originally specified.
- 3.6** A summary of the changes is set out below:
- definitions updated and a revised expiry date / extension opportunity to protect new unitary options
 - updating of section on notices to reflect current addresses and methods
 - updating of payments processes and timings to reflect actual practical arrangements that have been in use since Publica was formed
 - updating quality control arrangements to reflect the current position
 - updating of relevant insurance provisions to reflect what is procured in partnership with the councils
 - clarification about what is included within the annual report
 - a revised service specification (see below)
 - a revised communications protocol to clarify role of Member Representative Board (Shareholder Forum) and Client Office Group (Operational Forum).

Service Specification

- 3.7** Revised service specifications are provided (one for each council) setting out the services now provided post phases 1 and 2 of the Publica Review. These follow the



same format and level of detail in the original documents but are rewritten to reflect current service provision and there is one for each partner council. These are supported by detailed service plans for each service area which are provided to the council management teams.

- 3.8** The specifications will be live documents and reflect any further changes that occur should councils further amend service provision as we approach Local Government Reorganisation.

4. FUTURE TRANSITION OF SERVICES FROM PUBLICA TO THE COUNCIL

- 4.1** The Publica Business Plan (elsewhere on this Cabinet agenda) sets out how the partner councils and Publica will continue to work collaboratively to prepare the remaining Publica services for the impact of Local Government Reorganisation. In practice, this is likely to mean aligning staff operationally with one of the partner councils where possible, whilst they remain employees of Publica.

- 4.2** It is possible that some minor variations to the specification may be needed as a consequence of this work and this report seeks delegated authority to enact such minor amendments.

5. ALTERNATIVE OPTIONS

- 5.1** The council could continue to operate the arrangements with Publica under side letter but this would fail to provide clarity of revisions to roles and responsibilities and the service specification after the Publica Review.

6. FINANCIAL IMPLICATIONS

- 6.1** There are no direct implications from the approval of the revised governance arrangements set out in this report.

- 6.2** The Publica budget and revised costing model outcomes have been included within the 2026/27 budget and MTFS. Where any changes to service provision is made 'in year' these are subject to contract variations and budgets amended following close dialogue between the Publica and council finance teams.

7. LEGAL IMPLICATIONS

- 7.1** It is anticipated that the legal execution of the changes to the documents will be conducted, where possible, by deed of variation and will be carried out by the in-house legal team. Whilst the legal team does act on behalf of both parties no conflicts of interest are anticipated as the changes have been agreed by all parties.



8. RISK ASSESSMENT

- 8.1** Updating of these agreements seeks to minimise risk to the council moving forward by providing greater clarity in roles and responsibilities moving forward.
- 8.2** The documents seek to provide certainty to the councils that service provision will continue, provides certainty to Publica and its employees that contractual arrangements remain in place, whilst providing flexibility for the council or its successor to retain or amend the arrangements as necessary.

9. EQUALITIES IMPACT

- 9.1** There are no impacts of these changes under equality legislation.

10. CLIMATE AND ECOLOGICAL EMERGENCIES IMPLICATIONS

- 10.1** There are no impacts on sustainability matters through approval of these governance changes.

11. BACKGROUND PAPERS

- 11.1** None.

(END)

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Council	COTSWOLD DISTRICT COUNCIL
Name and date of Committee	CABINET - 16 APRIL 2026
Subject	RETENTION STRATEGY 2026-28
Wards affected	All
Accountable member	Councillor Mike Evely, Leader of the Council Email: mike.evely@cotswold.gov.uk
Accountable officer	Angela Claridge, Director of Governance & Development (Monitoring Officer) Email: angela.claridge@cotswold.gov.uk
Report author	Angela Claridge, Director of Governance & Development (Monitoring Officer) Email: angela.claridge@cotswold.gov.uk
Summary/Purpose	This report presents the Council's Retention Strategy for approval.
Annexes	Annex A – Retention Strategy
Recommendation(s)	That Cabinet resolves to: 1. Approve the Retention Strategy
Corporate priorities	<ul style="list-style-type: none"> • Preparing for the future • Delivering Good Services
Key Decision	No
Exempt	No
Consultees/ Consultation	The Leader and key officers Representatives of the recognised trade unions.



1. EXECUTIVE SUMMARY

- 1.1** This report presents the Council's Retention Strategy, developed to ensure that the organisation continues to attract, develop and retain a skilled and committed workforce capable of delivering the priorities set out in the Council Plan and Corporate Plan 2025–28. The strategy recognises the significant recruitment and retention pressures affecting local government including increased competition for talent, rising costs of living and sector wide difficulties in filling specialist and senior roles. It also acknowledges the uncertainty created by local government reorganisation which may affect workforce stability.
- 1.2** The Retention Strategy outlines a clear vision based on the Council's organisational values and establishes a structured approach to workforce planning, staff engagement, leadership development, career progression and inclusive practice. It sets out priority areas of work aligned to the Local Government Association's "Six Ps" framework: Plan, Promote, Process, Partnerships, People and Pledge supported by a programme of targeted actions intended to strengthen the employment offer and improve long-term retention.
- 1.3** By adopting this strategy, the Council reinforces its commitment to building a positive organisational culture, investing in staff development and establishing a resilient workforce capable of meeting current and future service demands.

2. BACKGROUND

- 2.1** The Council operates in a challenging national and regional context with local government organisations across the UK experiencing unprecedented recruitment and retention pressures. Factors such as increased vacancies, greater competition from the private sector, inflation driven pay expectations and difficulties filling specialist and leadership roles have contributed to workforce instability. These pressures coincide with rising demand for services, reduced spending power and the forthcoming local government reorganisation, all of which amplify the need for a clear and proactive retention approach
- 2.2** To support delivery of the Council Plan and the Corporate Plan 2025–28, the Council has developed the Retention Strategy to ensure it has the right people, with the right skills, in the right roles at the right time. The strategy is grounded in the Council's values and positions staff as the organisation's most important asset.



2.3 The strategy also aligns closely with the People & Culture Strategy and emphasises the importance of inclusion, diversity, strong leadership, employee engagement, and continuous professional development. It recognises the role of key stakeholders including elected members, senior leaders, HR, communications, line managers, trade unions, learning and development teams in shaping and sustaining a positive employee experience.

3. MAIN POINTS

3.1 Strategic Vision & Workforce Priorities

- Ensures the Council employs individuals who embody its core values and possess the skills needed to deliver current and future priorities.
- Positions workforce planning as a central component of organisational sustainability.

3.2 Responding to Recruitment & Retention Challenges

- Addresses sector wide issues such as competition for talent, rising pay expectations and difficulties filling certain roles.
- Recognises heightened uncertainty associated with local government reorganisation.

3.3 The 'Six Ps' Framework for Retention

The strategy adopts the Local Government Association's 'Six Ps' approach:

- Plan – we will ensure that we understand our workforce needs so that our actions are strategic
- Promote – we will raise our profile as an employer so that we strengthen the position of local government as an employer of choice
- Process – we will ensure that our recruitment approaches are both targeted to specific audiences, whilst taking an inclusive approach. Any person interested in working with us will have a positive experience.
- Partnerships – we will work with partners such as local educational institutions to build a talent pipeline into local government.
- People – we will balance attracting new talent and retaining our current employees by continuing to promote our workforce values.
- Pledge – we will work with other councils to share best practice and develop a wider pool of potential employees in addition to the existing Recruitment Team's talent pool.



3.4 Commitment to Inclusion

- Embeds inclusion as a fundamental principle ensuring all workforce policies and development opportunities are fair, accessible and supportive of diversity.

3.5 Leadership & Communication

- Emphasises the role of senior leaders and managers in modelling positive behaviours, supporting staff and building a culture of transparency, trust and respect.
- Highlights the importance of effective internal communication in supporting engagement.

3.6 Monitoring & Delivery

- Supported by a detailed action plan with responsibilities, timescales and status indicators to ensure progress is measurable and regularly reviewed.
- Ensures alignment with the Corporate Plan and prepares the workforce for future operating models resulting from reorganisation.

4. FINANCIAL IMPLICATIONS

4.1 Applying the 'Flexibility within Pay Policy' as outlined within the 'Retention Strategy' may result in increased staffing costs, including:

- Market supplements added to base pay.
- Accelerated progression to higher spinal points within the evaluated peer group.
- Higher starting salaries for new recruits where necessary to match market rates.

4.2 These adjustments may increase the total pay bill for affected services and need to be funded from existing budgets unless additional resource is approved.

5. LEGAL IMPLICATIONS

5.1 The Council must ensure that any retention measures comply with its statutory, best value and public law duties. The Council is subject to the Public Sector Equality Duty (Equality Act 2010) and as a result, an Equality Impact & Rurality Assessment has been completed to ensure that proposed retention measures do not directly or indirectly disadvantage any protected group within the workforce. Any differential pay, such as market supplements or targeted payments, must be objectively justified to mitigate equal pay risk.



6. RISK ASSESSMENT

6.1 The Council faces several workforce related risks driven by national recruitment pressures, rising service demand and uncertainty linked to local government reorganisation. Key risks include shortages in critical skills, difficulties attracting and retaining talent, and the potential impact of turnover on service delivery. Employee engagement, leadership capability, inclusion and the development of future talent pipelines also present ongoing challenges.

To mitigate these risks, the Retention Strategy sets out actions such as workforce planning, career pathway development, strengthened employer branding, improved recruitment processes, targeted wellbeing and engagement initiatives and closer collaboration with partner councils and education providers. The Strategy also emphasises strong leadership, inclusive practice and systematic use of workforce data to support informed decision making.

6.2 Overall, the approach aims to stabilise the workforce, improve resilience and ensure the Council remains able to deliver its corporate priorities effectively.

7. EQUALITIES IMPACT

7.1 The Retention Strategy has positive equalities impacts, as it embeds inclusion and diversity as core principles throughout the Council's workforce approach. The strategy recognises the importance of creating an inclusive working environment and commits to ensuring that recruitment, development and retention practices are fair, accessible and supportive of all employees.

7.2 It promotes equality through actions such as strengthening career progression pathways, improving employee engagement, supporting wellbeing and ensuring consistent performance management. The strategy also identifies the need to broaden the workforce by engaging underrepresented groups including targeted support for care experienced colleagues, helping to reduce barriers and improve representation across the organisation.

7.3 Overall, the strategy is likely to have a positive impact on workforce equality, supporting a diverse, inclusive and equitable organisational culture.

7.4 An Equality and Rurality Impact Assessment form was completed by the Head of HR on 13th March 2026. This highlighted the positive impact of implementing this strategy.



8. CLIMATE AND ECOLOGICAL EMERGENCIES IMPLICATIONS

- 8.1** The Retention Strategy indirectly supports the Council's climate and ecological emergency commitments by ensuring it has a stable, skilled and resilient workforce capable of delivering the environmental priorities outlined in the Council Plan. These include responding to the climate emergency and preparing for the future, both of which require specialist skills, organisational capacity and sustained staff engagement.
- 8.2** Strengthening recruitment, development and retention help safeguard the Council's ability to deliver climate related programmes, maintain momentum on environmental initiatives and build the internal expertise needed to meet long term sustainability goals. While the strategy does not introduce new environmental impacts, it contributes positively by supporting the workforce stability required to advance climate and ecological objectives.

9. BACKGROUND PAPERS

- 9.1** Equalities & Rurality Impact Assessment Form – 13th March 2026 held by Carmel Togher, Head of HR.

(END)



Retention Strategy

1. Introduction

We are an ambitious council, proud of the meaningful impact we make and the positive change we deliver for our communities every day. Our people are central to this success—their dedication, creativity, and commitment turn our aspirations into reality. Attracting the right people and creating an exceptional environment where they can grow, thrive, and choose to stay is not only important, but fundamental to the legacy we are building.

As a local authority, we remain committed to delivering the priorities set out in our Council Plan:

- Preparing for the future
- Delivering good services
- Responding to the climate emergency
- Delivering housing
- Supporting communities
- Supporting the economy

We pursue these priorities in the context of local government reorganisation, significant financial pressures across the sector, and a challenging national landscape driven by the rising cost of living.

Local Government Reorganisation is likely to create a period of uncertainty and may unsettle some staff. This comes at a time when national recruitment and retention pressures continue to affect many local government professions. These challenges have increased demand on our services, placed additional pressure on our workforce, and reduced overall spending power.

To respond to this, we have developed the Corporate Plan 2025–28, *“Building a lasting legacy for the Cotswolds”*, which ensures our resources are aligned to the priorities in the Council Plan. A critical element of this work is making sure we have the right people, in the right place, at the right time, with the right skills.

National issues in staff retention are also being felt at Cotswold District Council. These include increased competition for talent due to more vacancies than available candidates, rising pay expectations linked to inflation and cost-of-living pressures, greater difficulty in retaining skilled employees, and challenges in recruiting to senior positions, among other factors.

2. Scope

This policy applies to employees employed by CDC. It does not apply to workers, contractors, consultants or any self-employed individuals working for the Council.

3. Our Strategic Vision for Retention

To ensure that Cotswold District Council employs people who share Our Values of:

- We put our **communities first**: their priorities are our priorities
- We are **one team**: working for our residents and businesses
- We are **business focussed**: ensuring efficiency, effectiveness and good value for money
- We are **set up for success**: to deliver against our corporate priorities

We need to ensure all employees have the required skills and abilities to meet current and future needs, enabling the delivery of the Council Plan and ultimately the success of the council.

4. Why We Need a Retention Strategy

To achieve the ambitions set out in our Corporate Plan, we must continually assess our workforce requirements using robust, evidence-based analysis. This enables us to plan proactively, ensure our approach is inclusive, and monitor progress effectively. It also supports our efforts to retain our valued workforce and to prepare and develop our people for local government reorganisation.

Aligned with both our Corporate Plan and our People & Culture Strategy, this approach reaffirms our commitment to investing in our people; their success is the foundation of the lasting legacy we aim to build for our communities.

5. Commitment to Inclusion

As a council, we recognise the importance of inclusion and diversity. This strategy embraces inclusion as a core principle and is committed to ensuring that it is applied throughout.

6. Our Priorities to Achieve this Vision

The Local Government Association, in its advice on recruitment and retention best practice, suggests the use of the 'Six Ps' to create an effective recruitment process and these form the basis of our priorities:

- i. Plan – we will ensure that we understand our workforce needs so that our actions are strategic
- ii. Promote – we will raise our profile as an employer so that we strengthen the position of local government as an employer of choice
- iii. Process – we will ensure that our recruitment approaches are both targeted to specific audiences, whilst taking an inclusive approach. Any person interested in working with us will have a positive experience.
- iv. Partnerships – we will work with partners such as local educational institutions to build a talent pipeline into local government.
- v. People – we will balance attracting new talent and retaining our current employees by continuing to promote our workforce values.
- vi. Pledge – we will work with other councils to share best practice and develop a wider pool of potential employees in addition to the existing Recruitment Team’s talent pool.

It is envisaged that these Six Ps will be supported by initiatives including:

1. Career Progression – including opportunities available through Local Government Reorganisation
2. Employee Engagement and Involvement – awareness of decisions being made in the council and opportunities to contribute via staff briefings, culture club, staff surveys, etc
3. Communications - keeping everyone informed through the internal communications strategy
4. Leadership - providing strong senior leadership and empowering managers
5. Investing in training and professional – availability of a range of training opportunities
6. Annual Appraisals - strong culture of performance management
7. Culture of Trust and Respect – established between all levels of colleagues
8. Benefits - generous benefits package including Medicash and employee assistance

7. Key Stakeholders in Local Government Retention

Elected Members (Councillors)

- Provide political leadership and set strategic direction.
- Approve key policies, budgets, and workforce priorities.
- Champion a positive organisational culture.

Senior Leadership Team (CEO, Directors, Heads of Service)

- Translate political priorities into organisational action.
- Ensure retention goals are embedded across services.
- Model leadership behaviours that support engagement and wellbeing.

HR Team/Recruitment

- Design and lead the retention strategy.
- Provide workforce data, insight, and analysis.
- Support the development of pay, benefits, and reward strategies.
- Develop interventions: recruitment, onboarding, learning, wellbeing, reward, and organisational development.

Line Managers & Supervisors

- The biggest day-to-day influence on employee experience.
- Responsible for performance management, development conversations, team culture, and wellbeing support.
- Crucial in spotting retention risks early.

Trade Unions

- Key partners in shaping fair, inclusive, and workable employment policies.
- Help address concerns before they escalate.
- Support communication, consultation, and staff wellbeing.

Communications Team

- Craft messages that build trust, transparency, and engagement.
- Support internal campaigns that celebrate staff, promote development, and reinforce culture.
- Promote employer brand through use of social media outlets, such as LinkedIn, Facebook.

Learning & Development / Organisational Development

- Build capability, leadership pipelines, and career pathways.
- Strengthen organisational culture and readiness for change (e.g., LGR).
- Deliver training and development aligned to strategic priorities.

Version Control:	
Document Name:	Retention Strategy
Version:	1.0
Responsible Officer:	Director of Governance & Development
Approved by:	
Date First Approved:	
Next Review Date	

Objective	Action	Who	Timescale	Status
PLAN				
Conduct workforce planning to determine current and future workforce requirements in response to local government reorganisation	<ul style="list-style-type: none"> Assess projected service needs under the new unitary council (s) organisational Future Operating Model to determine future workforce demand. Analyse the difference between current workforce capacity and future requirements to identify gaps, surpluses, and critical risk areas. Strengthen workforce capability by using professional development, apprenticeships, reskilling, redeployment, and role design to address identified gaps. 	AC & LGR People & Culture workstream	TBD	exploratory
Review and update 100% of all job descriptions to ensure they accurately reflect current duties, required skills and reporting lines.	<ul style="list-style-type: none"> Review and rewrite job descriptions to clearly outline the required skills, responsibilities, and expectations for each role. Consultation between employees and managers to ensure descriptions accurately reflect day-to-day duties so staff fully understand what is required of them. Identify and document competencies and responsibilities that support career pathways and internal promotion opportunities. Align each job description with performance criteria to support fair, consistent performance reviews and help highlight individual or organisational skill gaps. 	Line mgrs in conjunction with HW	31.8.26	In progress

Objective	Action	Who	Timescale	Status
Define, promote and implement clear professional development & career progression opportunities across the organisation.	<ul style="list-style-type: none"> Annual appraisal provides the opportunity each year to discuss performance, objectives and ongoing professional development. Produce accessible apprenticeship materials (e.g., guides, portal pages) for all hard to fill roles. Integrate career pathways into HR processes, including recruitment, appraisal and learning and development. Communicate and promote new opportunities through internal channels such as staff briefings and the portal. 	Line mgrs CJ CT/HW/CJ CJ/CW	April – June 2026	In progress
Identify and prioritise hard to recruit and retain areas across the organisation	<ul style="list-style-type: none"> Work with Heads of Service to identify all roles and service areas experiencing recruitment & retention difficulties and implement targeted support interventions to address gaps in required skills, knowledge, and behaviours. 	HoS/HR	30.6.26	Exploratory
PROMOTE				
Promote core & optional employee benefits.	<ul style="list-style-type: none"> Promote benefits through multiple channels (e.g., portal, blogs staff briefings) to ensure all employees report awareness of the full benefits package in subsequent staff survey. 	CR/CW	16.3.26	In progress
Promote and enhance the employee assistance & wellbeing offer.	<ul style="list-style-type: none"> Promote CDC's wellbeing benefits through multiple channels (portal, newsletters, staff briefings, and wellbeing events). Track engagement and awareness through the employee survey. 	CR/CJ/CW	31.3.26	In progress

Objective	Action	Who	Timescale	Status
Promote role flexibility as a key attraction benefit to enhance retention.	<ul style="list-style-type: none"> Launch a refreshed messaging campaign highlighting flexible/hybrid working and relocation support. Revise the Relocation Policy to ensure it aligns with hybrid working arrangements 	CW	31.5.26	
		AC/CT	30.9.26	
Develop and maintain a strong local employer brand	<ul style="list-style-type: none"> Strengthen and promote our employer brand by analysing how candidates hear about us, identifying additional promotional channels, and implementing initiatives to enhance our reputation as an employer of choice to improve attraction and retention. 	SI	Ongoing	In progress
PROCESS				
Explore and assess opportunities for the effective use of AI across the organisation	<p>We will undertake work to start to understand what AI can do to support retention.</p> <ul style="list-style-type: none"> Improving employee experience through automation such as repetitive admin. Supporting wellbeing and early intervention – such as identifying sickness trends. Enhancing recruitment quality (which boosts retention) such as filtering candidates more successfully. Giving managers better insights and decision support – such as highlighting changes in employee engagement surveys. Helping understand why people leave – through analysis of exit interviews and resignation letters. Strengthening organisational culture – feedback trends through employee survey outcomes. 	GO	31.12.26	Exploratory
		CT/HW	Ongoing	
		SI	Ongoing	
		CW	Ongoing	
		HW	Ongoing	
		CW	Ongoing	

Objective	Action	Who	Timescale	Status
Utilise the "Flexibility within Pay" Policy that enables pay flexibility for hard-to-recruit roles while maintaining full alignment with the organisation's job evaluation framework.	<ul style="list-style-type: none"> Apply the organisation's "Flexibility within Pay" Policy in cases where the evaluated pay rate is not competitive enough to respond effectively to market pressures, ensuring timely and appropriate pay adjustments to support retention. Update the Policy to include a contractual "golden handcuffs" (tying an element of employees' pay to future service) when a market supplement is agreed, and in exceptional circumstances provide the Chief Executive to award a market supplement above 15% of basic salary for retention. 	CLT/CT	Ongoing.	
Embed the use of apprenticeship and progression roles by evaluating opportunities for trainee positions as vacancies arise.	<ul style="list-style-type: none"> Integrate a review stage into the CLT decision-making process to assess each vacancy and determine whether it can be redesigned as a development role rather than assuming a like-for-like replacement. 	HoS/CLT	Ongoing	In progress.
Sourcing strategies	<ul style="list-style-type: none"> We will review whether we use the best channels for advertising 			
PEOPLE				
Deliver the Year 2 implementation plan for the People & Culture Strategy	<ul style="list-style-type: none"> Continue delivering the People & Culture Strategy by implementing agreed actions relating to retention, employee development, wellbeing, and engagement, ensuring measurable improvements in staff experience and organisational culture. 	AC/CT	31.8.26	

Objective	Action	Who	Timescale	Status
Enhance engagement across the wider workforce, with a particular focus on supporting and involving care-experienced colleagues.	<ul style="list-style-type: none"> Develop targeted strategies to broaden our potential workforce, including initiatives that specifically support and attract people with care experience. 	SI/CJ	30.9.26	Exploratory
Ensure exit interviews are consistently conducted, analysed, and translated into actionable improvements to strengthen retention and employee experience.	<ul style="list-style-type: none"> Systematically use exit interview data to monitor reasons for leaving and evaluate the success of the People & Culture Strategy. 	HW	Ongoing	In progress
PLEDGE				
Collaboration with other councils across Gloucestershire	<ul style="list-style-type: none"> Develop a joint retention action plan in partnership with the councils across Gloucestershire. Develop a Partnership Agreement on Staff Movement and Recruitment from transition to the formation of the new unitary council(s) 	AC CT	31.8.26 31.8.26	exploratory

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Equality and Ruralty Impact Assessment Form

When completing this form you will need to provide evidence that you have considered how the ‘protected characteristics’ may be impacted upon by this decision. In line with the General Equality Duty the Council must, in the exercise of its functions, have due regard for the need to:

- a) Eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under the Equality Act 2010;
- b) Advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;
- c) Foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

This form should be completed in conjunction with the guidance document available on the Intranet

Once completed a copy should be emailed to cheryl.sloan@publicagroup.uk to be signed off by an equalities officer before being published.

1. Persons responsible for this assessment:

Names: Carmel Togher	
Date of assessment: 13 th March 2026	Telephone: 01285 623482 Email: carmel.togher@cotswold.gov.uk

2. Name of the policy, service, strategy, procedure or function:

Retention Strategy 2026-2028
Is this a new or existing one? New

3. Briefly describe its aims and objectives

<p>To retain skilled, motivated, and diverse employees by fostering a positive, inclusive, and engaging work environment that supports career development, recognises contributions, and aligns with council values, the council plan priorities and the people and culture strategy. As an ambitious council, we aim to recruit the right people and create a great workplace to retain talent.</p> <p>Actions the council will take include:</p> <ul style="list-style-type: none"> • Workforce planning and role clarity. • Review job descriptions and remove unnecessary requirements. • Develop career frameworks and succession planning.

- Maximize ATS (Applicant Tracking System) capabilities.
- Explore AI for recruitment.
- Promote flexible/hybrid working and relocation benefits.
- Continue Disability Confident accreditation.
- Build partnerships with educational institutions.
- Use apprenticeship standards for development roles.
- Network with neighbouring authorities for joint recruitment efforts.

4. Are there any external considerations? (e.g. Legislation/government directives)

The Employment Rights Act 2025 will have an impact in several areas including unfair dismissal rights at 6 months. Additional challenges are local government reorganisation, financial constraints, the cost-of-living crisis and national recruitment difficulties. These challenges have increased demand on our services, placed additional pressure on our workforce, and reduced overall spending power.

5. What evidence has helped to inform this assessment?

Source	✓	If ticked please explain what
Demographic data and other statistics, including census findings	<input type="checkbox"/>	
Recent research findings including studies of deprivation	<input type="checkbox"/>	
Results of recent consultations and surveys	<input checked="" type="checkbox"/>	Staff Survey February 2026
Results of ethnic monitoring data and any equalities data	<input type="checkbox"/>	

Anecdotal information from groups and agencies within Gloucestershire	<input type="checkbox"/>	
Comparisons between similar functions / policies elsewhere	<input checked="" type="checkbox"/>	Reviewed the Recruitment and Retention Strategy 2024-2026 from Lancaster City Council
Analysis of audit reports and reviews	<input type="checkbox"/>	
Other:	<input type="checkbox"/>	

6. Please specify how intend to gather evidence to fill any gaps identified above:

We recognise and acknowledge that our staff are our most important asset, and their commitment, motivation and enthusiasm is key to achieving our council plan priorities, embracing our council values and supporting our people and culture strategy. This strategy has been drafted to ensure we deliver on these aims and priorities.

7. Has any consultation been carried out?

Yes
We have consulted with the Extended Management Team, the Culture Club and the recognised trade unions of GMB and Unison.

If NO please outline any planned activities

8. What level of impact either directly or indirectly will the proposal have upon the general public / staff? (Please quantify where possible)

Level of impact	Response
NO IMPACT – The proposal has no impact upon the general public/staff	<input type="checkbox"/>

LOW – Few members of the general public/staff will be affected by this proposal	<input type="checkbox"/>
MEDIUM – A large group of the general public/staff will be affected by this proposal	<input checked="" type="checkbox"/>
HIGH – The proposal will have an impact upon the whole community/all staff	<input type="checkbox"/>
This strategy will impact the staff who are employed by us and members of the general public who wish to work for us.	

9. Considering the available evidence, what type of impact could this function have on any of the protected characteristics?

Negative – it could disadvantage and therefore potentially not meet the General Equality duty;

Positive – it could benefit and help meet the General Equality duty;

Neutral – neither positive nor negative impact / Not sure

	Potential Negative	Potential Positive	Neutral	Reasons	Options for mitigating adverse impacts
Age – Young People		✓		Our Corporate Plan 2025-28 ‘Building a lasting legacy for the Cotswolds’, ensures our resources are aligned to the priorities in the council plan. A critical element of this work is making sure we have the right people, in the right place, at the right time, with the right skills. Creating an inclusive and diverse culture with equality for all. We want to treat people fairly, value differences and remove barriers to people fully participating in public life.	
Age – Old People		✓		See above	
Disability		✓		See above	
Sex – Male		✓		See above	
Sex – Female		✓		See above	
Race including Gypsy and Travellers		✓		See above	

Religion or Belief		✓		See above	
Sexual Orientation		✓		See above	
Gender Reassignment		✓		See above	
Pregnancy and maternity		✓		See above	
Geographical impacts on one area			✓	See above	
Other Groups		✓		See above	
Rural considerations: ie Access to services; leisure facilities, transport; education; employment; broadband.		✓		See above	

10. Action plan (add additional lines if necessary)

Action(s)	Lead Officer	Resource	Timescale
Review of objectives detailed in Retention Strategy table covering the areas of Plan, Promote, Process, Partnerships, People and Pledge. These areas identified by the Local Government Association in line with best practice on recruitment and retention.	Angela Claridge	LGR People and culture workstream, line managers, recruitment, communications, HR, Learning and Development and Heads of Service	Various deadlines during 2026 and other objectives continuing throughout 2027 and early 2028

11. Is there is anything else that you wish to add?

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Declaration

I/We are satisfied that an equality impact assessment has been carried out on this policy, service, strategy, procedure or function and where an negative impact has been identified actions have been developed to lessen or negate this impact. We understand that the Equality Impact Assessment is required by the District Council and that we take responsibility for the completion and quality of this assessment.

Completed By:	Carmel Togher	Date:	13.03.2026
Line Manager:	Angela Claridge	Date:	30/03/2026
Reviewed by Corporate Equality Officer:	Cheryl Sloan	Date:	25/03/26



Council name	COTSWOLD DISTRICT COUNCIL
Name and date of Committee	CABINET - 16 APRIL 2026
Subject	ADVERTISING, SPONSORSHIP & ENDORSEMENT POLICY
Wards affected	All
Accountable member	Cllr Mike Evely, Leader of the Council Email: mike.evely@cotswold.gov.uk
Accountable officer	Angela Claridge, Director of Governance & Development (Monitoring Officer) Email: angela.claridge@cotswold.gov.uk
Report author	Angela Claridge, Director of Governance & Development (Monitoring Officer) Email: angela.claridge@cotswold.gov.uk
Summary/Purpose	This report presents the Council's Advertising, Sponsorship and Endorsement Policy for approval.
Annexes	Annex A – Advertising, Sponsorship & Endorsement Policy
Recommendation(s)	That Cabinet resolves to: 1. Approve the Advertising, Sponsorship & Endorsement Policy
Corporate priorities	<ul style="list-style-type: none"> • Preparing for the future • Delivering Good Services • Supporting the Economy
Key Decision	No
Exempt	No
Consultees/ Consultation	The Leader and key officers



1. EXECUTIVE SUMMARY

- 1.1** This report introduces the Council's Advertising, Sponsorship & Endorsement Policy, designed to provide a clear, consistent and transparent framework for managing all commercial partnerships and promotional activities. The policy seeks to ensure compliance with legal and regulatory requirements and protect the Council's reputation by preventing conflicts of interest or perceptions of undue influence.
- 1.2** Local authorities are widely regarded as trusted organisations and their endorsement can offer a competitive advantage to businesses. While such promotion can support regeneration and job creation, it also carries risks where organisations do not align with the Council's values.
- 1.3** The policy defines the Council's approach to advertising, sponsorship and endorsement, outlining mandatory requirements, categories of acceptable and unacceptable proposals, governance controls and approval thresholds. It reinforces the need for objective decision-making appropriate risk assessment and annual review of all agreements. The policy also includes a governance checklist to ensure impartiality and compliance with statutory guidance such as the Local Government Act 1986 and the associated Publicity Code.
- 1.4** Approval of this policy will strengthen the Council's commercial practice, the management of promotional activities and provide assurance that such activities uphold the Council's values, corporate priorities and legal obligations.

2. BACKGROUND

- 2.1** The Council increasingly engages with external organisations through promotion, sponsorship and endorsement opportunities. New or expanding business are highlighted to acknowledge their positive impact on local employment and regeneration.
- 2.2** As these interactions can generate valuable income and community benefits, it is essential that they are managed within a robust governance framework.
- 2.3** Historically, approaches to such opportunities have varied across services, creating inconsistency in how proposals are evaluated, approved and monitored. In addition, national guidance, particularly the Publicity Code, requires councils to ensure all communications are lawful, objective, politically impartial and aligned with the public interest.



- 2.4** To address these requirements, the Council has developed a comprehensive policy that sets out clear definitions, principles and expectations for officers and members. This includes ensuring proposals comply with legislation, adhere to corporate branding standards, avoid reputational risks and support transparency in decision-making.
- 2.5** The policy also formalises approval routes, clarifies responsibilities and establishes a central register for monitoring purposes. This strengthens governance and reduces the risk of perceived or actual conflicts of interest.

3. KEY POINTS FROM THE POLICY

3.1 Clear Definitions & Scope

- The policy distinguishes between advertising, sponsorship and endorsement, ensuring all parties understand the nature and implications of each arrangement.
- It applies both to the Council as a provider of promotional opportunities and as a participant in external promotional activity.

3.2 Principles & Legal Compliance

- All arrangements must align with the Council's core values, strategic priorities and legal obligations.
- Compliance with the Advertising Standards Authority (ASA) codes and relevant legislation is mandatory.
- The Council retains the right to decline proposals that may be inappropriate or damaging to its reputation.

3.3 Acceptable & Unacceptable Categories

- The policy identifies types of advertising or sponsorship the Council may accept, focusing on alignment with community and organisational values.
- It prohibits opportunities that may cause harm, promote illegal activities or undermine public confidence.

3.4 Mandatory Governance Requirements

- All agreements must be documented in writing and reviewed by Legal Services.



- Branding, logo use and promotional content must comply with corporate guidelines.
- Agreements must include a defined duration, obligations, benefits and risk assessment

3.5 Approval & Oversight

- High value agreements (over £50,000) require Cabinet Member approval.
- A central register will record all agreements, ensuring transparency, auditability and regular review.

3.6 Impartiality & Conflict of Interest Controls

- Officers and Members must declare all relevant interests.
- Commercial relationships must not influence decision making or create real or perceived bias.

3.7 Monitoring & Review

- All agreements are subject to annual review to ensure continued appropriateness and compliance.
- The policy itself will be reviewed every three years or sooner if required.

4. FINANCIAL IMPLICATIONS

4.1 This report does not have any direct financial implications.

5. LEGAL IMPLICATIONS

5.1 Legal implications have been covered in the body of the report.

5.2 These activities need to be open and justified to avoid any suggestions of partiality, bribery or pre-determination on other matters.

6. RISK ASSESSMENT

6.1 Providing a competitive advantage to an organisation carries several risks for a local authority, including the perception of favouritism, which can undermine public trust and the authority's reputation for fairness and impartiality. Such promotion may create actual or perceived conflicts of interest, particularly if the business appears



connected to an elected member or officer and may prompt complaints or challenge from competitors who feel disadvantaged. It can also distort the local market by influencing consumer behaviour in favour of one provider and risks misalignment with the Council's values if the organisation's practices later prove inconsistent with ethical, environmental or social standards. Additionally, endorsement may inadvertently signal bias in future procurement activity, blur the boundaries between economic development and commercial promotion and expose the authority to reputational harm should the organisation face controversy or operational failure.

- 6.2** These risks can be mitigated by adopting a clear and consistently applied policy that sets out transparent criteria for any promotional activity, ensuring decisions are based on objective public-interest considerations rather than individual preference. Robust governance arrangements, including documented decision-making, declarations and management of interests as well as separation of roles between elected members and officers, help prevent actual or perceived conflicts. Undertaking due diligence on organisations before entering any promotional relationship ensures alignment with the Council's values and minimises reputational exposure. Providing equal access to opportunities, avoiding exclusive endorsements and maintaining clear boundaries between economic development support and commercial promotion further reduce the risk of market distortion or perceptions of unfair advantage. Regular review of these arrangements and clear communication with stakeholders support ongoing public confidence.

7. EQUALITIES IMPACT

- 7.1** There are no direct equalities impacts arising from the adoption of an Advertising, Sponsorship and Endorsement Policy; however, the policy, if adopted, reinforces the Council's Public Sector Equality Duty by ensuring that any promotional activity is applied transparently and without discrimination.

8. CLIMATE AND ECOLOGICAL EMERGENCIES IMPLICATIONS

- 8.1** The adoption of the Advertising, Sponsorship and Endorsement Policy does not in itself give rise to direct ecological or climate-emergency impacts. However, the manner in which advertising, sponsorship and endorsement opportunities are managed may have indirect implications for the Council's environmental objectives.



As part of the due-diligence process, consideration should be given to whether prospective partners operate in a way that is consistent with the Council's climate-emergency commitments and wider sustainability principles. This approach will help ensure that the Council does not enter into promotional arrangements with organisations whose activities or values could undermine its environmental priorities or compromise its leadership position on climate action. Alignment with the Council's ecological and climate objectives should therefore form a routine element of the assessment of all proposed partnerships.

9. BACKGROUND PAPERS

9.1 None

(END)



Advertising, Sponsorship & Endorsement Policy

1 Purpose

This policy provides a consistent framework for managing advertising, sponsorship and endorsement opportunities in a way that maximises income generation, protects the Council's reputation, ensures compliance with legislation, promotes transparency and safeguards officers and elected members from allegations of bias or impropriety.

2 Scope

This policy applies to:

- The Council as an advertiser, sponsor or endorser.
- The Council as an owner of advertising platforms or sponsorship/endorsement opportunities offered to external organisations.

3 Definitions

- Advertising: An arrangement where the Council provides space or media for promotional content in exchange for money or benefits in kind.
- Sponsorship: A mutually beneficial arrangement where an organisation provides funds, goods or services to support council activities in return for agreed recognition or benefits.
- Endorsement: An official statement or action of formal support, approval or validation for a person, project, policy or product, signifying the Council recognises its merit, suitability or alignment with public interest.

4 Principles

- All advertising, sponsorship and endorsement must align with the Council's core values, strategic objectives and legal obligations.
- Agreements must comply with Advertising Standards Authority (ASA) codes and relevant legislation.
- The Council retains the absolute right to decline any opportunity deemed inappropriate or damaging to its reputation.
- The Council will not favour one business over another but its approach may be different when dealing with not-for-profit organisations.

5 Acceptable & Unacceptable Categories

- Acceptable categories are those activities or initiatives that align with Council and community values and promote positive engagement.
- Unacceptable categories are those activities, products or services that could cause harm, promote illegal or unethical behaviour or conflict with Council values.

6 Mandatory Requirements

- All agreements must be in writing, reviewed by Legal Services and signed by authorised officers.
- Sponsorship, advertising and endorsements must not influence Council decisions or create conflicts of interest.
- Branding and logo use must comply with the Council's Corporate Guidelines.
- Agreements must specify duration, obligations, benefits and include a risk assessment.

7 Procedures

- Opportunities will be published on the Council's website.
- Proposals must be assessed by the relevant Head of Service and Communications Team particularly considering any sensitivities.
- High-value agreements (eg, over £50,000) require Cabinet Member approval.
- All agreements logged in a central register and reviewed annually for compliance and conflicts.

8 Monitoring & Review

- Annual review of all agreements to ensure continued appropriateness.
- Policy reviewed every three years (or sooner if required).

9 Disclaimer

Acceptance of advertising or sponsorship does not imply endorsement of products or services by the Council. All materials must carry the disclaimer: 'Whilst every effort has been made to ensure accuracy, the Council does not endorse or accept liability for any claims made by advertisers or sponsors.'

10 Contact

For any queries, please contact the Communications Team.

Checklist for Impartial Business Promotion by Local Authorities

1 Governance & Compliance

- Confirm compliance with the Local Government Act 1986 and Publicity Code.
- Ensure all publicity is objective, factual and politically impartial.
- Verify that promotion serves a clear public interest purpose (eg, economic development, carbon reduction or other corporate priorities of the Council).

2 Equal Access & Fairness

- Use open calls for participation in promotional activities (eg, directories, events).
- Publish clear eligibility criteria for inclusion.
- Avoid exclusive arrangements unless justified by procurement rules or competitive tendering.

3 Transparency

- Document the decision-making process for selecting businesses or other organisations the Council works with.
- Record the rationale for inclusion (eg, job creation, sustainability).
- Make records available for audit and scrutiny.

4 Conflict of Interest

- Require officers and councillors to declare interests.
- Ensure no personal or financial gain influences decisions.
- Apply the Member Code of Conduct consistently.

5 Inclusive Promotion

- Promote business sectors or clusters, not individual firms where possible.
- Highlight social values and community-wide benefits (eg, skills development, local employment, environmental outcomes, etc).
- Use neutral language; avoid endorsements or advertising tone.

6 Monitoring & Review

- Regularly review promotional activities for compliance, fairness and adherence with Council corporate values and priorities.
- Include impartiality checks in internal audit or governance reviews.
- Capture lessons learned for future campaigns.

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Council name	COTSWOLD DISTRICT COUNCIL
Name and date of Committee	CABINET – 16 APRIL 2026
Subject	ARTIFICIAL INTELLIGENCE POLICY & ADOPTION STRATEGY
Wards affected	All
Accountable member	Mike McKeown - Cabinet Member for Climate Change and Digital Email: Mike.McKeown@cotswold.gov.uk
Accountable officer	John Chorlton – Chief Technology Officer, Publica Email: Democratic@Cotswold.gov.uk
Report author	John Chorlton - Chief Technology Officer, Publica Email: Democratic@Cotswold.gov.uk
Summary/Purpose	The purpose of the report is to consider a strategy for the adoption of Artificial Intelligence (AI) across council services that protects residents and service users whilst enabling them to access the benefits that AI can offer. The report also recommends the adoption of a policy to guide use of AI for employees and councillors.
Annexes	Annex A – AI Usage Policy Annex B – AI Adoption Strategy
Recommendation(s)	That Cabinet resolves to: 1. Approve the AI Usage Policy at Annex A 2. Approve the AI Adoption Strategy and Roadmap at Annex B
Corporate priorities	<ul style="list-style-type: none"> • Preparing for the Future • Delivering Good Services
Key Decision	YES
Exempt	NO



COTSWOLD

District Council

Consultees/ Consultation	Corporate Management Team
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1. **EXECUTIVE SUMMARY**

- 1.1. This report sets out a strategy to manage the adoption of Artificial Intelligence (AI) across Cotswold District Council and its key delivery partners.
- 1.2. The strategy will ensure that appropriate safeguards are built into all AI development activity so that the interests of residents and businesses are safeguarded whilst benefiting from the advantages AI can bring.
- 1.3. The strategy sets out the strategic objectives for the adoption of AI in the council's workflows and provides an action plan that will ensure that appropriate governance mechanisms are developed and adhered to.
- 1.4. Appropriate human oversight is a key element of the responsible implementation of AI and the strategy sets out the principles for how this will be applied.
- 1.5. Recommendations are made to adopt the strategy, action plan and policy document to enable the council to make appropriate safe, business led decisions that will enhance service delivery and improve value for money.

2. **BACKGROUND**

- 2.1. Artificial intelligence (AI) is becoming a core part of how modern councils operate. Used well, it can help deliver clearer communication, faster responses, better access to information and improved consistency across services. It can also reduce pressure on staff by automating repetitive tasks, supporting complex case work, and enabling officers to focus on the human elements of public service that matter most.
- 2.2. However, like any change, AI also brings challenges and concerns – in this case for residents, businesses and employees. Strong governance is essential to ensure that artificial intelligence is used safely, transparently and responsibly across the council's activities. Governance provides clarity for officers and councillors, builds public trust, and ensures that AI adoption aligns with both the council's ambitions and legal duties.



- 2.3. It is clear from the wider economy that the implementation of AI in business processes can be an expensive and time-consuming enterprise. Evaluating the benefits of artificial intelligence is essential, therefore, for ensuring responsible adoption, maintaining public trust and supporting continuous improvement. The council will measure value in ways that reflect the needs of residents, the experience of officers and the strategic priorities of the organisation, including preparation for Local Government Reorganisation (LGR).
- 2.4. This adoption of a strategy and associated policy will enable the council to safely, confidently and proactively adopt artificial intelligence to improve services for residents and local businesses, support our workforce, and strengthen the council's long-term resilience ahead of Local Government Reorganisation (LGR) in 2028.
- 2.5. The AI Strategy sets out **how the council will adopt and apply AI** to improve services, increase productivity, support officers and deliver better outcomes for residents, businesses and community organisations.
- 2.6. The AI Policy sets out the **rules, boundaries and mandatory requirements** for the council's use of artificial intelligence.
- 2.7. It is critical that we make it clear when AI is being used to generate information responses and also that where decisions are made that these will be made via human intervention.

3. **DEVELOPING AN APPROACH TO AI DEPLOYMENT**

- 3.1. Uncontrolled roll out or 'maverick' use of AI could create risk for residents, businesses and employees of the council by providing inaccurate or unproven information to support decision making. Uncontrolled adoption could also cause significant financial burden through unexpected licence fees and risks of legal challenge where inaccurate information is provided.



- 3.2. To support the safe deployment of AI within Cotswold District Council a carefully constructed strategy is required to ensure all appropriate stakeholders views are taken into consideration.
- 3.3. The key objectives of the strategy are to: -
- Improve access to information and make services easier to use.
 - Reduce administrative workload for officers and councillors.
 - Support financial sustainability through efficiency gains.
 - Strengthen consistency and quality in decision-support processes.
 - Ensure the council is ready to transfer tools and processes to the new unitary authority.
- 3.4. The strategy seeks to build on the ICT infrastructure we have where possible to avoid unnecessary budget impacts. This may involve procurement of additional tools or rolling out the use of standardised mainstream tools available to users. All investments must be supported by business cases.
- 3.5. Given the key objectives set out in 3.3 above, and the timetable with regard to LGR, it is sensible to focus the deployment on key services where it can have the greatest impact. The strategy, therefore, focuses on the following 'early adopter' services: -
- Customer Services – the first point of interaction for most residents
 - Planning Services – large service area with significant volume of customer contact and large document requirements
 - Democratic Services – high level of administrative work and document search requirements including support for Councillor AI use
- 3.6. These areas of early adoption do not prevent other users coming forward with appropriate business cases or indeed adopting standard AI tools embedded within core systems such as Copilot.
- 3.7. The strategy sets out the way the safeguards will be built into adoption through the establishment of an AI Oversight Board which will examine the business cases and implementation requirements. These governance arrangements will include the requirements for transparency of AI use and the human oversight principles for decision making.



3.8. Attached to the strategy is a Roadmap which will support the adoption of AI, the underlying guidance (guardrails), and business case development.

4. ALTERNATIVE OPTIONS

- 4.1. The council could choose not to approve the AI Adoption Strategy and AI Usage Policy but this could create risks with regard to unconstrained AI adoption within the council creating risks to the council, residents and service users.
- 4.2. By failing to utilise the benefits available from AI the council may not meet residents and service users expectations and may fail to deliver additional service efficiencies.

5. FINANCIAL IMPLICATIONS

- 5.1. Use of AI in service provision can offer many benefits to service users and provide the opportunity to enhance efficiency of service provision and support the achievement of savings targets embedded within the Medium-Term Financial Strategy (MTFS). However, unconstrained adoption of AI can bring high-cost implementation and unanticipated licence fee impacts which could challenge business case assumptions.
- 5.2. The establishment of an AI Oversight Board with appropriate representation to include s 151 officer and monitoring officer will enable decisions to be taken on AI adoption that are safe from both a financial viewpoint and an information transparency viewpoint.
- 5.3. Any financial implications that require additional funding will be brought forward on an individual basis for approval.

6. LEGAL IMPLICATIONS

- 6.1 AI is not, currently, directly regulated in the UK, although a private member's bill (The Artificial Intelligence (Regulation) Bill) has been reintroduced to parliament for debate. The safeguards lie within other legislation.



- 6.2 As mentioned elsewhere in the report, use of AI needs to be closely monitored in relation to leaking of council confidential data and information as well as copyrights. To make sure decisions are robust and less likely to be challenged, AI can help gather the information and suggest an answer but a final decision from a person expert in the area will help avoid challenges.
- 6.3 The key point to avoid challenges will be the training of staff, so that they are able to spot issues and raise them with the relevant person.

7. RISK ASSESSMENT

- 7.1. New technologies inevitably bring new risks, and the adoption of AI is no exception. It is therefore important that the Council takes a careful and proportionate approach when introducing AI, ensuring that risks are properly considered before any new system is used. This strategy is intended to ensure that potential risks are assessed in advance and that appropriate controls and governance arrangements are in place.
- 7.2. A key risk associated with the uncontrolled use of AI in council services is the reliability, accuracy and fairness of information used to support decisions made by officers, councillors and residents. Experience from other organisations shows that automated or algorithmic approaches can sometimes produce biased or misleading outcomes. Such bias can affect service quality, decision-making consistency and public confidence, and may also contribute to unfair treatment across a range of service users and communities if not properly managed.
- 7.3. The use of AI also raises wider issues around accountability, transparency and public trust. Decisions influenced by AI must remain lawful, explainable and open to challenge. The Council will always retain responsibility for decisions taken, even where technology or external suppliers are involved. There are also inherent cyber security and supplier-dependency risks associated with AI systems, which require effective oversight and ongoing management.
- 7.4. Financial considerations are equally important. There is a risk that the cost of implementing and maintaining AI systems may outweigh the benefits if not carefully controlled, limiting value for money and placing pressure on the Council's MTFS. At the same time, failing to adopt AI where it is appropriate may result in missed opportunities to improve efficiency or service quality. A balanced approach, supported by clear business cases and evidence of benefits, is therefore essential.



8. EQUALITIES IMPACT

8.1. This strategy sets out a framework within which we will make decisions. Any such decisions will need to have due regard to the equalities impact of any such decisions.

9. CLIMATE AND ECOLOGICAL EMERGENCIES IMPLICATIONS

9.1. This strategy sets out a framework within which we will make decisions. Any such decisions will need to have due regard to the climate change and ecological implications of any such decisions.

9.2. The strategy very specifically cites these matters as key issues for any investments given the energy impact that data centre development is known to have on energy infrastructures.

10. BACKGROUND PAPERS

The following documents have been identified by the author of the report in accordance with section 100D.5(a) of the Local Government Act 1972 and are listed in accordance with section 100 D.1(a) for inspection by members of the public:

None

(END)

Cotswold District Council

Artificial Intelligence (AI) Policy

1. Introduction and Purpose

Artificial Intelligence (AI) technologies are reshaping industries globally, offering transformative potential for the public sector. Within the Council, AI can streamline operations, elevate service delivery, enhance decision-making through data analysis, and modernise communication with residents and stakeholders. However, such advancements bring ethical, legal, and operational challenges that demand rigorous governance, oversight, and responsible use.

This policy establishes a robust framework for the ethical adoption, deployment, and management of AI systems, ensuring alignment with the Council's core values, legal obligations, and strategic goals. It defines accountability and transparency measures, mitigates associated risks, and supports continuous innovation to adapt to evolving AI landscapes.

2. Scope

This policy applies to:

- All Council staff, including employees, councillors, consultants, contractors, vendors, and third-party service providers engaged with Council-related activities.
- All AI systems and tools, including but not limited to: Large Language Models (LLMs), generative AI (e.g., ChatGPT, Copilot, Gemini), machine learning algorithms, robotic process automation (RPA), and predictive analytics tools.
- AI use cases involving Council-owned systems, external platforms, or personally managed devices when used for Council business.

The policy extends across the entire AI lifecycle, from procurement, development, and implementation to monitoring, evaluation, and decommissioning. Compliance with this policy is mandatory for all.

3. Defining Artificial Intelligence

AI refers to computational systems and software that perform tasks requiring human-like cognition, including reasoning, prediction, learning, and decision-making. Common AI functionalities include:

- **Machine Learning (ML):** Systems that learn and improve autonomously from data.
- **Generative AI:** Tools that create text, images, code, or media content based on inputs.
- **Natural Language Processing (NLP):** Systems that analyse, generate, or interact using human language.
- **Robotics and Automation:** Technologies that perform repetitive tasks without human intervention.
- **Predictive Analytics:** AI-driven insights that forecast outcomes or trends using historical data.

These AI tools can function independently or integrate into software platforms to enhance operational capabilities, automate tasks, and generate actionable insights.

4. Core Principles for AI Adoption

The Council is committed to the ethical, secure, and transparent deployment of AI. The following principles underpin all AI-related activities:

1. **Ethical Use:** AI must promote the public good, operate within ethical frameworks, and respect human dignity and rights.
2. **Transparency and Explainability:** AI systems must be clearly documented, with processes and decision-making outcomes made understandable to stakeholders.
3. **Accountability:** Human oversight must accompany AI deployment, ensuring that outputs, decisions, and potential impacts are subject to review.
4. **Fairness and Inclusivity:** AI systems must avoid perpetuating bias, discrimination, or exclusion. Measures must be taken to identify and mitigate algorithmic bias.
5. **Data Privacy and Security:** Personal, sensitive, or confidential data must be protected through compliance with UK GDPR and the Data Protection Act 2018.

6. **Accuracy and Reliability:** AI outputs must be evaluated, fact-checked, and validated to avoid errors, inaccuracies, or misinformation.
7. **Environmental Sustainability:** AI deployment must consider energy consumption, resource efficiency, and overall environmental impact.
8. **Continuous Improvement:** AI systems should undergo regular evaluation, updating, and monitoring to align with technological advancements and Council priorities.

5. Roles and Responsibilities

The Council has established clear accountability for AI oversight:

- **Members:** Provide democratic oversight, scrutiny, and strategic direction for the Council's use of AI, ensuring it is lawful, ethical, transparent, and aligned with the public interest. Members approve relevant policies and strategies and hold officers to account for effective and responsible AI governance.
- **Executive/Senior Management Teams:** Ensure AI aligns with Council strategy, regulatory requirements, and ethical principles while achieving organisational objectives.
- **ICT and Data Protection Teams:** Conduct risk assessments, data protection reviews, and ensure system compliance with security and privacy standards.
- **Procurement Team:** Vet AI vendors for ethical practices, data security measures, and legal compliance during acquisition processes.
- **Managers:** Implement AI tools responsibly, ensuring that risks, ethical implications, and performance are managed throughout the lifecycle.
- **All Officers:** Maintain awareness of AI usage policies, adhere to ethical guidelines, and report any issues, misuse, or security concerns promptly.

6. Ethical and Compliant AI Usage

To mitigate risks and ensure responsible AI adoption, the following must be observed:

- **No Unauthorized Data Input:** Do not input personal, confidential, or sensitive data into public AI tools or platforms.

- **Risk Assessments:** Perform Data Protection Impact Assessments (DPIAs) for AI projects involving personal data or decision-making processes.
- **Bias Monitoring:** Regularly evaluate AI systems to detect and address algorithmic bias that could impact fairness.
- **Accuracy Verification:** Outputs from AI tools must be rigorously validated before dissemination or decision-making.
- **Pre-Approval Requirements:** Obtain formal approval from ICT and Data Protection Teams before adopting or implementing new AI systems.
- **Human Oversight:** Ensure human review and governance mechanisms accompany AI-driven decision-making to prevent adverse outcomes.

7. Identified Risks of AI Adoption

The Council recognizes the following key risks associated with AI deployment:

- **Data Breaches:** Unauthorized access, leakage, or misuse of personal or organizational data.
- **Bias and Discrimination:** AI systems unintentionally producing unfair or exclusionary outcomes.
- **Accuracy and Misinformation:** AI-generated content or predictions lacking reliability or factual accuracy (e.g., hallucinations).
- **Legal and Copyright Issues:** Content generation that infringes on intellectual property or regulatory standards.
- **Environmental Impact:** High energy consumption associated with AI tools requiring robust resource management.
- **Cybersecurity Vulnerabilities:** Exposure to malicious attacks or system compromise.

8. Permitted AI Use Cases

The Council encourages AI for tasks that enhance productivity, insight, and service delivery, including:

- Generating draft reports, presentations, and non-confidential correspondence.

- Summarizing large datasets, trends, and documents for research or analysis.
- Improving customer support through AI-enabled chatbots and virtual assistants.
- Automating repetitive, manual tasks to improve operational efficiency.
- Supporting decision-making through predictive analytics and performance insights.

9. Prohibited Uses of AI

AI systems must not be deployed for:

- Automated decisions lacking human oversight or accountability where risks of automated decision making have not been assessed and approved by the AI Board.
- Processing sensitive, personal, or commercially confidential data on unapproved platforms.
- Generating content that infringes intellectual property, violates ethical guidelines, or promotes misinformation.
- Use cases conflicting with Council policies, legal obligations, or community values.

10. Training and Awareness

To foster responsible AI usage, the Council will:

- Provide ongoing training for staff on AI ethics, bias detection, and legal compliance.
- Promote awareness of AI's benefits, limitations, and associated risks.
- Encourage staff to adopt a proactive, transparent approach to AI integration while maintaining vigilance for unintended consequences.
- Educate teams on environmental sustainability considerations and mitigation strategies.

11. Monitoring, Auditing, and Review

- The Council will conduct periodic reviews to assess AI performance, compliance, and risk mitigation strategies.

- Annual audits will ensure continued alignment with legal standards, Council goals, and emerging AI governance frameworks.
- Feedback loops will be established to gather insights from staff and residents to improve AI usage.

12. Related Policies and References

This policy complements the following documents:

- Data Protection Policies
- Information Security Policy
- Equality and Inclusion Policy
- Procurement Policies
- ICT Usage Policies
- Environmental Sustainability Policy

Version 4:

Updates: Changes to terminology.

Council: Cotswold District Council

Date Approved:

Next Review: [Insert Date]

Cotswold District Council

Artificial Intelligence Adoption Strategy

2026

1. Introduction

Cotswold District Council is adopting artificial intelligence (AI) in a responsible, practical and cost-effective way. This strategy outlines how AI will improve services for residents and businesses whilst preparing the council for Local Government Reorganisation (LGR) in 2028. The approach focuses on clear benefits, strong governance, and avoiding unnecessary complexity.

2. Strategic Objectives

AI will be used to:

- Improve access to information and make services easier to use.
- Reduce administrative workload for officers and councillors.
- Support financial sustainability through efficiency gains.
- Strengthen consistency and quality in decision-support processes.
- Ensure the council is ready to transfer tools and processes to the new unitary authority.

AI will not replace human decision-making without an assessment of the risks of such decisions being considered and approved. Human oversight remains essential.

3. Principles for Responsible AI Use

The council's methodology is governed by five fundamental principles:

3.1 Resident First

Artificial intelligence will be leveraged to enhance customer experience, streamline communication, and improve accessibility to services.

3.2 Safe and Accountable

All outputs generated by AI will undergo human review, ensuring transparency regarding the application of AI technology.

3.3 Business Case Led Adoption

AI initiatives are required to demonstrate clear benefits, such as improved efficiency, enhanced quality, or better service delivery; all investments must be substantiated by robust business cases.

3.4 Simplicity and Portability

Mainstream, secure platforms will be utilized to ensure ease of transfer to new authorities. Where appropriate, AI will also be integrated into essential corporate systems. The total cost of ownership and LGR will influence all decisions.

3.5 Skills and Confidence:

Staff will receive comprehensive training and guidance to ensure safe and effective use of AI.

4. Service Priority Areas for Adoption

4.1 Customer Services

- Faster, clearer responses to residents.
- AI guidance tools for common enquiries.
- Enhancements for telephone and online queries.
- Ensuring residents can choose a human adviser during business hours

4.2 Planning Services

- Automating Validation Checks on applications
- Summarising applications and consultee comments.
- Support with Local Plan analysis.
- Drafting and refining reports.
- Improving timeliness and consistency in case handling.

4.3 Democratic Services

- Drafting minutes from transcripts.
- Summarising lengthy documents.
- Improved search across minutes and decisions.

4.4 Climate and Sustainability

- Support for retrofit and energy-efficiency guidance.
- Data analysis for carbon reporting.
- Automating routine reporting.

4.5 Corporate Support Functions

- Drafting routine letters, reports or guidance.
- Improving internal document search.
- Supporting HR, Legal and Finance with summarisation and research.

4.6 Councillors

- Summaries of key documents.
- Support responding to resident enquiries.
- Briefing preparation for meetings.

5. Governance and Assurance

Robust governance will ensure AI is safe, ethical and transparent. We will adopt the following control mechanisms.

5.1 AI Board

A cross-council board will oversee major AI proposals, ensuring:

- There is a sound financial business case.
- Legal and ethical compliance.
- Alignment with priorities.
- Risk assessment and mitigation.
- Portability for the new unitary authority.
- Environmental responsibility

5.2 Human Oversight

- All processes that use AI are mapped and understood before any automation takes place.
- Officers must review AI-generated content for reports before use.
- No automated decision-making in statutory or high-risk areas –other automated decision making to be risk assessed and the approach approved by the AI Board.

5.3 Transparency Requirements

- Residents must know when AI is being used.
- AI tools must not be presented as human.
- Informal advice (e.g., planning or climate) must be clearly labelled.

6. Technology Approach

6.1 Approved AI Platforms

The council will minimise risk and cost by focusing on a small number of secure and trusted approved platforms. Whenever possible, the Council will take advantage of existing environments and contracts, for example the Microsoft Enterprise Agreement.

Proprietary AI built into existing systems will be considered where integration benefits outweigh long-term constraints and where there is no or limited financial impact of adopting this approach.

6.2 Platform Register and Approval Processes

The ICT service will maintain an AI Platform Register that lists all approved tools and models. The register will:

- Capture the AI platforms in use across the council.
- Evaluate tools for compliance, reliability and security.
- Provide guidance to officers on approved options.
- Ensure portability to the new unitary authority.

6.3 IT Capability and Skills

Strong capability within IT service is essential to delivering the council's AI ambitions. The council will work with Publica to:

- Develop AI skills within the IT team to support model evaluation and AI assurance.
- Build capability in AI development.
- Support integration of AI with existing systems where beneficial.
- Provide architectural oversight on AI projects.
- Ensure AI tools meet security, accessibility and performance standards.

6.4 Shared Learning and Collaboration Across Gloucestershire

Where beneficial, the council will work with neighbouring authorities to share learning, tools and governance approaches. This may include:

- Sharing AI agents or templates for common functions.
- Joint exploration of AI opportunities with county partners.
- Contributing to county-wide digital or transformation groups.

7. Measuring Impact

7.1 Outcomes by end of 2027

- AI widely used in customer-facing and back-office functions.
- Consistent improvements in response times and resident satisfaction.
- Meaningful productivity gains captured across priority services.
- A maturing AI culture with high confidence across officers and councillors.

7.2 Key indicators

- Faster response times and improved service satisfaction.
- Reduced administrative workload and fewer backlogs.
- Improved accuracy and consistency of outputs.
- Producing financial savings supporting the Medium-Term Financial Strategy.
- Improved accessibility of information for residents and councillors.

8. Implementation Roadmap (2026–2028)

8.1 May 2026 – September 2026

- Establish AI Board.
- Identify resource requirements.
- Development of governance documents.
- Development of baseline training.
- Configure technology platform choices
- Modify ICT Asset Register to identify AI enabled applications
- Develop processes to inform Public of AI usage.
- Participate in Gloucestershire AI sharing workshops.
- Launch Salesforce enabled AI customer service processes already developed.
- Develop and Publish pilot internal AI Agents

8.2 October 2026 – March 2027

- Launch baseline training
- Launch AI Champions
- Develop and publish additional internal AI Agents
- Develop and pilot external AI Agents for specific service areas – e.g. planning, climate change.
- Monitor benefits and refine governance.

8.3 April 2027 onwards

- Strengthening training and support for staff.
- Scale successful tools across services.
- Expand planning and climate guidance agents.
- Ensure all tools are portable and well-documented.
- Provide training materials, case studies and governance templates.
- Support transition activities with shadow unitary arrangements.

9. Environmental Responsibility

- AI projects must consider carbon impact.
- Preference for suppliers using energy-efficient platforms.
- Only scale tools where benefits justify environmental cost.
- AI should support climate objectives, such as reducing travel or improving retrofit guidance.

10. Summary and Commitment

This strategy sets a clear, practical approach to AI adoption that supports better services, reduces workload, improves financial sustainability and prepares the council for the upcoming transition. The council commits to responsible, transparent use of AI that enhances—not replaces—human judgement.

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Council name	COTSWOLD DISTRICT COUNCIL
Name and date of Committee	CABINET - 16 APRIL 2026
Subject	CREATION OF COMMERCIAL DEVELOPMENT LEAD ROLE
Wards affected	All
Accountable member	Cllr Tony Dale, Cabinet Member for Health, Culture and Visitor Experience Email: tony.dale@cotswold.gov.uk
Accountable officer	Helen Martin, Director of Communities and Place Email: helen.martin@cotswold.gov.uk
Report author	Helen Martin, Director of Communities and Place Email: helen.martin@cotswold.gov.uk
Summary/Purpose	To seek Cabinet's approval of the creation of a part-time, fixed term post to drive commerciality across the culture sector in Cirencester and the wider district.
Annexes	None
Recommendation(s)	That Cabinet resolves to: <ul style="list-style-type: none"> • Approve the creation of a fixed term contract post to work with visitor attractions to drive up income and reduce costs. • Endorse the principle of targets for growth over the two years and grants delegated authority to the Director of Communities and Place in consultation with the Cabinet Members for Health, Culture and Visitor Experience to set out the detailed proposals for how this is calculated and reported.
Corporate priorities	<ul style="list-style-type: none"> • Preparing for the future • Delivering good services



	<ul style="list-style-type: none">• Supporting communities• Supporting the economy
Key Decision	No
Exempt	No
Consultees/ Consultation	Leader, Cabinet Member, Corporate Leadership Team including S151 officer.

EXECUTIVE SUMMARY

- 1.1 The cultural economy is a vital component of the local economy and of the vibrancy and vitality of our town centres. In England, every £1 generated by arts and culture catalyses an additional £1.23 in economy wide impact, creating jobs and supporting supply chains across tourism, education and retail.¹
- 1.2 Its value, however, is greater than its economic output, as the sector also plays a crucial role in shaping the fabric of our communities, enriching lives, offering inspiration and creating both a sense of identity and sense of place.²
- 1.3 As we move towards Local Government Reorganisation and unitarisation, it is incumbent on councils to ensure that services are on a sound financial footing and in the best position possible. It is even more important for non-statutory functions that are offered at the discretion of a local authority but nonetheless provide considerable social value and community benefit to be sustainable in the long term, whoever is running them.
- 1.4 The council does not own or operate all the culture offer in Cirencester or the wider district and even those facilities that it does, such as the Corinium Museum, are operated by a contracted third party. However, in terms of Preparing for the Future and ensuring CDC leaves a legacy, it is proposed that we create a fixed term role to work with such facilities in a consultative capacity to drive up income, drive down costs and ensure self-sustaining facilities for generations to come.

2. BACKGROUND

- 2.1 Cotswold District enjoys a vibrant cultural scene. The area hosts some well-known cultural assets, from long established institutions reflecting the area's history, such as the Corinium Museum and the Court Barn, through to recently established institutions, such as the Cidermill Theatre in Chipping Campden and the Barn Theatre in Cirencester. The sector spans from venues to festivals and from classical to popular, with venues like the Tetbury Goods Shed and New Brewery Arts as well as events such as the Longborough Opera Festival and the Phoenix Festival.

¹ [Public Value of Arts and Culture.pdf](#)

² [CULTURE AND HERITAGE CAPITAL: MONETISING THE IMPACT OF CULTURE AND HERITAGE ON HEALTH AND WELLBEING](#)

- 2.2 As a result of the importance of the cultural economy, the Council adopted in July 2025 the “Creative Cotswolds – a Cultural Strategy for Cotswold District”.
- 2.3 Creative Cotswolds is an open partnership for local organisations engaged in creative and cultural activity. Creative Cotswolds will bring together a network of partners to realise opportunities to collaborate on events, to work together on promotion and explore opportunities to expand the reach and impact of the sector.
- 2.4 The strategy sets out several values: Sustainability, Connecting, Nurturing, Inclusive and Creativity and Freedom. Alongside these values sits an action plan with activity under themes such as leadership and coordination, sharing best practice and stimulating the local economy and tourism.
- 2.5 What the strategy and action plan stop short of however, is the resources or capacity to provide support and guidance to help ensuring the economic sustainability of the operation of partners and to enable facilities to Prepare for the Future.

3. MAIN POINTS

- 3.1 The November 2025 report “The Economic Impact of Gloucestershire’s Visitor Economy 2024”³ shows that in 2024 Cotswold received 543,000 staying visitor trips and 5,369,000-day visits. This equates to a total visitor related spend of £380 million. In the region of 12% of this spend is on attractions and entertainment. So, whilst many of these visitors may not have spent their time and money on our local cultural venues and events, it does demonstrate the scale of the untapped potential. If even a small percentage of these day-visits became overnight stays the impact on the economy would be significant.
- 3.2 There is also an increasing body of evidence that links engagement in culture and heritage with health and wellbeing. It has been shown to help prevent, treat and manage physical and mental health problems.⁴ So, the whole system impact of a vibrant cultural sector is significant.
- 3.3 There is a real scope for CDC to take leadership in this space in the two years the council has remaining and the scale of that impact will be proportionate to the scale of its ambition.

³ [PowerPoint Presentation](#)

⁴ [CULTURE AND HERITAGE CAPITAL: MONETISING THE IMPACT OF CULTURE AND HERITAGE ON HEALTH AND WELLBEING](#)

- 3.4 Therefore, it is proposed that the Council seeks to engage an experienced commercial professional who knows the cultural landscape, has sector contacts and can engage with funders and relevant organisations such as the Arts Council to grow the sector.
- 3.5 This individual would work in collaboration with existing operators of all assets and to support them to grow income and drive down costs. Whilst the role would work across the district, an immediate priority will be to ensure that the Corinium Museum is on a sound financial footing.
- 3.6 They would also be tasked with looking at creating new or expanding existing events and activities to attract new and repeat visitors and ensure a longer dwell time.
- 3.7 It is not intended to overly prescribe what the role could do but they would be set several deliverables and KPIs to be measured against (for example, number of organisations supported). Over the two years a target could be set for increased cultural revenue, stepped targets of £30k per quarter rising to circa £500k by the end of year 2. It is envisaged that over time this role would in effect pay for itself. For instance, if the public subsidy to the museum could be reversed.
- 3.8 The post holder would report to the Director of Communities and Place and work closely with the Economic Development and tourism teams as well as Freedom Leisure.

4. ALTERNATIVE OPTIONS

- 4.1 The alternative option is not to approve the creation of this post. Creative Cotswold Partnership will continue but without the resource to support venues to grow income and reduce costs.

5 FINANCIAL IMPLICATIONS

- 5.1 The report sets out the business case to establish a new post; Commercial Development Lead, on a part-time basis for a fixed term period of two years to support culture and heritage at the Corinium Museum and more widely across the District.
- 5.2 A fixed term contract is the preference. Market testing would need to be undertaken to establish the average salary and once the job description is agreed this would need to be evaluated.



- 5.3 If recruiting to a fixed term contract is not successful in attracting the right skill set and the post were recruited to on an agency basis it is estimated that the annual cost would be £600 per day x 130 days = £78,000 (£156,000 in total).
- 5.4 Whilst the report indicates this post over time would be self-funding, there is no guarantee that this outcome will be achieved. Therefore, members should consider the creation of the role as an additional cost to the council and not anticipate additional income or cost reduction in their decision.
- 5.5 Assuming the post was recruited on a substantive basis for two years, funding would need to be provided from either the 'Building Capacity Fund' or from identifying savings elsewhere in the Council's budget.
- 5.6 Depending on the recommendations made by the lead there is the potential for future financial asks to support increased marketing and promotion. This cannot be confirmed at this time and would be the subject of further approvals.

6 LEGAL IMPLICATIONS

- 6.1 As for all recruitments, this temporary post will need to be advertised openly for fairness in processes.

7 RISK ASSESSMENT

- 7.1 Not acting risks ongoing subsidy by the council and loss of additional revenue into the economy to the detriment of the sustainability of businesses and events.
- 7.2 The success of the post will be dependent on the buy in of the various visitor attractions to work in collaboration. This role is to provide industry experience and knowledge, guidance and advice rather than to provide additional capacity per se. The other organisations will need capacity to action and deliver the changes needed and will have finite financial resource to do so.
- 7.3 There is also a risk that the proposed actions recommended by the lead will require input from other Council services (such as the Communications team) to highlight and showcase the activity, and this marketing and promotion will potentially incur not only officer time but also budget.



8 EQUALITIES IMPACT

8.1 No issues identified.

9 CLIMATE AND ECOLOGICAL EMERGENCIES IMPLICATIONS

9.1 None.

10 BACKGROUND PAPERS

10.1 None.

(END)

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Council name	COTSWOLD DISTRICT COUNCIL
Name and date of Committee	CABINET - 16 APRIL 2026
Subject	UBICO BUSINESS PLAN 2026-27
Wards affected	All
Accountable member	Mike Evely Leader of the Council Email: mike.evely@cotswold.gov.uk
Accountable officer	Helen Martin Director of Communities and Place Email: helen.martin@cotswold.gov.uk
Report author	Peta Johnson Head of Waste and Environment Email: peta.johnson@cotswold.gov.uk
Summary/Purpose	To consider the draft Ubico Business Plan 2026-27, produced by Ubico in consultation with its directors and shareholders, and to endorse that the Leader (as Shareholder Representative) approves the plan.
Annexes	Annex A – Ubico Business Plan 2026-27
Recommendation(s)	That Cabinet resolves to: <ol style="list-style-type: none"> 1. Note the draft Ubico Business Plan 2026-27; and 2. Endorse that the Leader of the Council, as shareholder representative, will sign the written resolution to approve the draft Ubico Business Plan 2026-27.
Corporate priorities	<ul style="list-style-type: none"> • Delivering Good Services • Responding to the Climate Emergency
Key Decision	NO



COTSWOLD

District Council

Exempt	NO
Consultees/ Consultation	<ul style="list-style-type: none">• Cabinet Member for Environment and Regulatory Services• Corporate Leadership Team of CDC and Publica• s151 Officer• Legal



1. EXECUTIVE SUMMARY

- 1.1** The draft Ubico Business Plan 2026–27 has been produced in consultation with Ubico’s directors and shareholder councils. As a shareholder in Ubico, the Council is required to consider the Business Plan annually, with formal approval given by the Leader in their capacity as the Council’s Shareholder Representative.
- 1.2** The Plan marks the transition from Ubico’s previous five-year vision to a new strategic roadmap for 2026–2031, focusing on improving efficiency, leveraging scale, and preparing for Local Government Reorganisation.
- 1.3** For the Council, the Business Plan sets out a range of priorities that will support service delivery during 2026–27. These include improvements in emissions reporting, preparations for the introduction of plastic film collections as part of Simpler Recycling, and actions to accelerate decarbonisation, including the use of alternative fuels and low-emission fleet options. The Plan also includes commitments relating to the mobilisation of collection services in Wiltshire and an expanded programme of accreditation and performance management.
- 1.4** There are no direct financial, legal or equality implications arising from the approval of the Business Plan, as the Council’s budget is already agreed and no changes to service access or eligibility are proposed. However, failure to approve the Plan may result in risks to the Council’s shareholder obligations, create operational uncertainty, and delay planned service and environmental improvements.
- 1.5** Cabinet is asked to consider the draft Business Plan and to endorse that the Leader, as the Council’s Shareholder Representative, will complete the required written resolution to approve it.

2. BACKGROUND

- 2.1** Cotswold District Council (The Council) is a shareholder of Ubico Limited (Ubico), a Teckal company designed to deliver environmental services.



- 2.2** Under a Service Agreement with the Council, Ubico provides household waste and recycling collections, along with street cleansing and grounds maintenance services. The current Service Agreement terminates on 31st March 2027.
- 2.3** Following a Cabinet decision (5th February 2026), the Council is proceeding with negotiations to enter into a Common Service Agreement with Ubico beyond the term of the current agreement.
- 2.4** Each year, Ubico prepares a Business Plan in collaboration with its shareholder councils.
- 2.5** The Managing Director of Ubico led an engagement session with Councillors and Officers on 20th January 2026. This was an opportunity to review an early version of the 2026-27 Business Plan, ask questions, and provide feedback.
- 2.6** This led to the production of the draft Business Plan (provided as Annex A), which where agreed, will be adopted for the coming financial year.
- 2.7** As part of the establishment of Ubico, a range of items were identified as reserved matters for Council (Shareholder) approval to ensure that shareholder councils retained control over the company.
- 2.8** The reserved matters decisions fall to the shareholder representatives to determine; in the case of the Council the shareholder representative is the Leader of the Council.
- 2.9** Where the draft Business Plan is approved, the shareholder representative will be required to sign a written resolution to formalise the decision.

3. UBICO BUSINESS PLAN 2025-26, OVERVIEW AND PROGRESS AGAINST COMMITMENTS

- 3.1** The 2025-26 Business Plan was organised around the Ubico five-year vision (2021 – 2026): *To be recognised by our customers and employees as a quality provider of sustainable services for our local communities, delivering best value and reliability.*



3.2 The Ubico Business Plan highlighted the delivery of this vision through:

- Leveraging synergies and economies of scale;
- Harnessing opportunities to deliver value back to our partners;
- Using technology to drive operational efficiency;
- Understanding our communities’ needs;
- Inspiring our workforce to be committed to providing value for money and carbon neutral services.

3.3 Delivery of the vision and Business Plan was underpinned by four strategic pillars. These are described in the table below, together with example commitments and progress that has been achieved during 2025-26.

Ubico Strategic Pillars	Commitments and Progress
People	
<i>We will have a well-trained, supported and engaged workforce who live our values and are proud to work for Ubico.</i>	Continued employee engagement programme to gain feedback and identify areas for continuous improvement.
Operational Excellence	
<i>We will deliver high quality services which remain safe and compliant, seeking continuous improvement in productivity, value, and service excellence. We will harness innovation where appropriate and will explore synergies and opportunities for partnership and cross boundary working.</i>	The Business Plan identified an ongoing process of benefits realisation from in-cab technology. In-cab technology has been in place on collection services since 2022. This was rolled out onto street cleansing services in 2025-26.
Business Development	
<i>We will build business development capability which enhances our partnerships and allows for effective</i>	Contract renewals, growth, and the development of services in line with



<p><i>identification, analysis, and presentation to shareholders of potential new business opportunities. We will explore opportunities that aren't simply about profit, including those that would deliver greater value, help our communities, or improve services.</i></p>	<p>change (LGR, Simpler Recycling) were all identified in 2025-26.</p> <p>Contract renewals are being progressed. Ubico will grow in the coming financial year by providing collection services to Wiltshire, and Ubico are working with all partners to document and develop services in line with expected changes.</p>
<p>Climate</p>	
<p><i>We will minimise our environmental impact and support our shareholders to meet their carbon neutral targets, integrating carbon reduction opportunities wherever reasonably possible in both our fleet and non-fleet activities.</i></p>	<p>Improvements in reporting Scope 1, 2 and 3 emissions were identified as an action. This continues into 2026-27.</p> <p>Building on the success of introducing Alternative Fuelled Vehicles (AFV) for some partners, Ubico are planning to further minimise emissions, including with the Council through the planned installation of fuel tank, sourcing of sustainable Hydrotreated Vegetable Oil (HVO) and intention to procure and operate an electric recycling vehicle.</p>

4. UBICO BUSINESS PLAN 2026-27, AREAS OF FOCUS FOR THE COUNCIL

4.1 Now at the end of the five-year vision, Ubico are entering into the period of a five-year strategic roadmap (2026-2031). This five-year strategy focuses on leveraging increased scale, delivering further operational efficiency, and preparing for a changing local government landscape.

4.2 Delivery builds upon the areas identified in 2026-27 (e.g. leveraging scale and harnessing technology) with the following areas described:

- Mobilising and delivering services for Wiltshire Council from August 2026;
- Preparing for Local Government Reorganisation;
- Accelerating decarbonisation;



- Embedding robust performance management, including integration of a balanced scorecard approach.

4.3 Key commitments for 2026-27 include:

- Provision of a dedicated team to support the mobilisation of services in Wiltshire;
- Increased capacity in support services;
- Beginning the process of extending ISO accreditation to energy and quality management systems;
- Beginning the process of evidencing high standards in driver and vehicle compliance through accreditation to the Driver and Vehicles Standards Agency (DVSA) Earned Recognition Scheme;
- Development of a strategy to harness emerging technologies, artificial intelligence, and data analytics to facilitate smarter decision making;
- Appointment of a dedicated climate lead responsible for coordinating carbon reduction activities, supporting shareholder sponsored projects;
- Planning for the additional collection of plastic film in line with Simpler Recycling.

5. ALTERNATIVE OPTIONS

5.1 The Leader of the Council, as shareholder representative, has full delegated authority to approve the Ubico Business Plan. The only option is for the Leader to approve or to refuse. Other than to support transparency there is no constitutional need for a report to be considered and noted by Cabinet.

6. CONCLUSIONS

6.1 It is recommended that the draft Ubico Business Plan 2026-27 is approved.

6.2 The Business Plan applies to Ubico as a whole, providing services to all seven current shareholders (extending to eight shareholders with the addition of Wiltshire). The key commitments included in this Business Plan that relate to the Council will be extracted and tracked throughout 2026-27, via a service provider action plan. This plan will be reviewed each month with Ubico, with progress tracked quarterly at the Environmental Services Partnership Board meeting (ESPB).



7. FINANCIAL IMPLICATIONS

7.1 There are no additional financial implications arising from the Ubico Business Plan, as the Council's 2026/27 approved budget already includes the agreed Ubico contract value of £9.173 million. Furthermore, the 2026/27–2029/30 approved Capital Programme makes provision of £7.8 million for the replacement of recycling and food waste fleet vehicles, as well as for decarbonisation measures, including the introduction of HVO fuel and the purchase of one electric vehicle.

8. LEGAL IMPLICATIONS

8.1 The Ubico Business Plan must be approved by a simple majority of shareholders of which the Council is one.

9. RISK ASSESSMENT

9.1 Where the Business Plan is not approved the following risks may apply:

- Failure to meet the Council's shareholder obligations;
- Delay or disruption to Ubico's planned operational improvement;
- Reduced transparency or uncertainty for Ubico.

10. EQUALITIES IMPACT

10.1 The Business Plan sets out operational priorities for 2026–27 but does not propose changes that would alter access to services, eligibility, or working practices in a way that would require an equality assessment.

11. CLIMATE AND ECOLOGICAL EMERGENCIES IMPLICATION

11.1 Through commitments such as accelerating decarbonisation, improving emissions reporting, and supporting shareholder-led climate projects, the Plan forms part of the Council's wider ecological emergency response.

12. BACKGROUND PAPERS

12.1 None

(END)



2026/27 Business Plan

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1. Business Overview

1.1. Introduction

Ubico is a successful and well-respected local authority owned company operating across Gloucestershire and West Oxfordshire. We deliver high quality environmental services including waste and recycling collections, grounds maintenance, street cleansing and household recycling centre management. Our purpose is to keep places clean and green for every resident, visitor, town, village and community. Working in close partnership with our shareholder councils, we strive to deliver a service that benefits both councils and communities, helping them achieve their individual objectives.

Ubico has seen significant growth since we started delivering services in 2012 and will grow again in 2026/27 with the commencement of environmental service delivery for Wiltshire Council from July 2026, and the mobilisation and delivery of these services will be a key focus for the year.

Our growth, size and position places us in a strong position to leverage opportunities for greater efficiencies across a wider base, leading to cost-savings for our councils and their residents and the opportunity to explore new and exciting areas for growth and innovation. A new five-year strategy roadmap for the company from 2026 to 2031 has been developed, building on the successes already achieved in the previous five years.

We are a significant local employer, particularly in Gloucestershire, where we were 64th in the top 100 employers in the county based on 2023 turnover, up from 72nd in 2022. In 2026/27 we will employ around 1,300 people, who are the backbone of our operations. We will continue to have a strong focus on our people this year and advance our work on climate initiatives. This includes fleet decarbonisation, improving resource and energy use efficiency, biodiversity and clean energy, as well as working closely with our partners to support them in delivering their ambitious climate targets. A key consideration for the next five years is the change that Local Government Reorganisation could bring, and we will work closely with our shareholders who may be affected by this to help prepare for any such transition.

1.2. Quality and safety

Ensuring high standards of health, safety and compliance is a key priority and underpins everything we do. This is demonstrated through our ongoing achievement of industry-recognised accreditations, including ISO 45001 and ISO 14001 for our Health and Safety Management and Environmental Management Systems respectively, which reflects our positive health and safety culture which we are committed to maintaining and improving. Our Safety, Health, Environment and Quality (SHEQ) team drive our safety culture and practices, and health and safety performance is monitored at all levels of the business and reviewed by our board of directors at every board meeting. Our internal compliance team supports the company in maintaining high standards through a thorough programme of scrutiny involving both scheduled and risk-based assessments, checking compliance in key areas such as ISO standards, fleet compliance, Environment Agency permitting requirements and the Health & Safety at Work Act 1974. This is complemented by our annual internal audit plan which is drawn up in consultation with the Risk and Audit Committee and in partnership with our independent internal auditors.

1.3. Our services



1.4. Our shareholders



Wiltshire Council will also join as a shareholder during 2026.

1.5. Governance and risk management

1.5.1. Governance

Good corporate governance and the continued professional development of the board of directors and the senior management team is fundamental to the effective operations of the company. In 2026/27 we will continue to ensure appropriate competency standards and qualifying criteria are applied to all directors and follow the spirit of the UK Corporate Governance Code. At all times, the company will remain open, transparent and accountable. The board and its members will operate as a cohesive team, with its priority to further the aims, goals and values of the company, whilst always having risk and risk management at the forefront of discussions.

The board is supported by two sub-committees, a Risk and Audit Committee and a Governance and Nominations Committee. These committees support the board in key governance areas, for example, better understanding of business risk, and ensuring the processes to mitigate risk are effective and there is compliance.

1.5.2. Risk management

Risk management is a core principle of effective corporate governance and is also a key contributor to a sound internal control environment.

Our strategic risk management objectives include board and senior management setting a 'tone from the top' on the level of risk we are prepared to accept – our 'risk appetite'. We maintain a strategic approach to risk management in order to make better informed decisions and use risk management to enable consistent appraisal of options and improved flexibility/agility in delivering change. Overall, we aim to develop a culture of balanced and informed risk-taking throughout Ubico, including strategic, programme, partnership, project and operational risk.

1.6. Our values

Ubico was created to enable local authorities to enjoy greater efficiencies through economies of scale, and more control over the delivery of services. This approach is reflected in our company values, which are applied across all our services.



1.7. Balanced Scorecard (BSC)

We are continuing our development of the 'Balanced Scorecard' BSC approach for tracking key indicators. BSC is a strategic management performance metric used to identify and improve various internal business functions and their resulting external outcomes. This mechanism will be integrated into the Ubico 2030 Strategy. The BSC leverages and standardises significant key performance indicators (KPIs) and key results indicators (KRIs) to measure and showcase our performance against strategic objectives and our four pillars. It offers a comprehensive view of organisational performance, ensuring every aspect of the business is evaluated.

2. Business Plan 2026/2027

2.1. Our company vision

Recognised by our customers and employees as a quality provider of sustainable services for our local communities, delivering best value and reliability

Through:

- Leveraging synergies and economies of scale
- Harnessing opportunities to deliver value back to our partners
- Using technology to drive operational efficiency
- Understanding our communities' needs
- Inspiring our workforce to be committed to providing value for money and carbon neutral services

2.2. Strategic pillars

Four strategic pillars underpin delivery of our vision and our business plan:



2.3. Strategy planning

2.3.1. Annual planning and engagement process

Ubico's board routinely evaluate the validity of our company vision, and the roadmap for its delivery, ensuring it reflects the needs and desires of our shareholders and maintains the company as a sound proposition, whilst driving value. The process for drawing up the annual business plan incorporates feedback from key stakeholders, including the company's senior management team and the board. Shareholder engagement presentations take place with each shareholder council ahead of presentation of the final written business plan, which incorporates feedback received.

2.3.2. Introduction of the new five-year strategic roadmap (2026–2031)

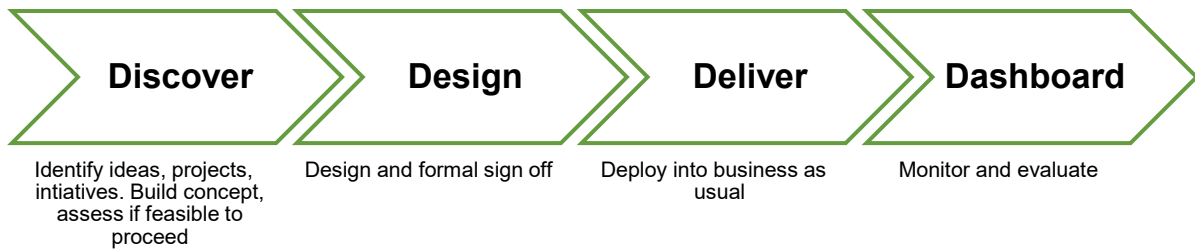
2026/27 marks a pivotal year for Ubico as we conclude delivery of our 2021–2026 strategic plan and commence a new five-year strategy roadmap covering 2026–2031. The previous five-year period saw significant organisational growth, expansion of our digital capabilities, delivery of high standards in operational performance, and substantial progress in carbon reduction. Building on these achievements, our new five-year strategy focuses on leveraging our increased scale, delivering further operational efficiency, and preparing for a changing local government landscape. Key long-term priorities include:

- Leveraging scale and collaboration across shareholders to enhance efficiency and resilience.
- Mobilising and delivering services for Wiltshire Council from August 2026, one of Ubico's largest new service programmes.
- Preparing for potential Local Government Reorganisation, enabling early opportunities for alignment and future-proof service planning.
- Accelerating decarbonisation, improving depot and fleet efficiency, strengthening environmental, social and governance reporting, and supporting partner climate goals.
- Embedding robust performance management, including full integration of the balanced scorecard.
- Harnessing technology, AI and data analytics to drive improved insights, operational optimisation and financial sustainability.
- Investing in people, including recruitment, retention, learning and succession planning to meet future workforce needs.

As the first year of our new strategic roadmap, 2026/27 continues the momentum of the past five years. The priorities set out for this year will help us to both build on the progress we have already made and lay firm groundwork for the years ahead.

2.4. Project lifecycle

We have adopted a project lifecycle with four phases; Discover, Design, Deliver and Dashboard:



This aids in identifying the stage of each project or initiative to support our long-term planning and strategy mapping, as well as resource management.

All projects and programmes are managed through a stage gateway system and strategic projects are managed by the Project Management Office (PMO) and sponsored by a member of the executive leadership team. The project scope, objectives, goals, budget, and necessary stage documents are closely managed by the senior leadership team, and progress against delivery of strategic projects is routinely monitored by the board.



A thriving workforce that is skilled, motivated, and aligned with Ubico's values

2.5. People pillar

2.5.1. 2026/27 activity

In our people pillar we will continue our focus on attraction and retention, supporting and valuing our excellent colleagues. We have previously undertaken a project to review and enhance employee terms and conditions and will conclude this work by implementing the agreed benefits this year. We have successfully broadened our recruitment routes for new employees in the past few years, to include working with a wider range of local employment hubs and community programmes, and this year will work to strengthen these relationships to maintain robust recruitment channels. We will develop the use of our new candidate application system, using data insights to inform recruitment strategy, and will evaluate our sourcing and advertising channels to identify any opportunities. We will design an appraisal scheme to suit all levels of the business and will continue the development of our succession planning process, introduced in 2025/26, and use it to inform and build our future talent pipeline.

Our communications strategy has a strong focus on our market presence and enhancing our reputation to support attraction and retention. Our employee engagement programme, delivered now for the past three years, has proven invaluable in gaining feedback from colleagues across the company. This year's survey will be enhanced to include specific questions around leadership to identify strengths and weaknesses, and the process for post-survey review and feedback will be formalised. We will continue to celebrate and promote our successes, making best use of our social media platforms and other communication channels to promote working for Ubico and entering relevant sector awards, and will implement a peer-to-peer and manager-led recognition programme.

In 2026/27, Ubico will grow again, welcoming teams delivering environmental services in Wiltshire, and proportionally increasing capacity requirements in a number of our support teams which will be recruited to throughout the year. In our people pillar we will support the mobilisation and successful delivery of these services through proactive engagement from the earliest opportunity, comprehensive support throughout the TUPE process, the provision of effective inductions and training for our new colleagues, and the integration of ongoing support into our business-as-usual operations following service commencement.

2.5.2. People – key risks and mitigations

Risk	Mitigation
People team capacity to manage an expanding portfolio.	Additional, appropriate, people team resource and capacity included in relevant business cases to ensure support in place.
Broader sector challenges, such as competition for talent, changes in local authority funding, and evolving employment practices, can impact Ubico’s ability to attract and retain staff.	Increase reach of vacancies, routes to recruitment and improve job application process. Ongoing monitoring of market conditions, interest in our vacancies, vacancy fill rate and attrition rate. Adaptation of recruitment and retention strategies.
Loss of knowledge with retiring personnel / risk of losing colleagues in key roles.	Succession planning project underway and used to inform future talent pipeline.
Low engagement or wellbeing issues can lead to reduced productivity, higher absence rates, and increased turnover.	Annual engagement surveys, action plans, and recognition programmes are in place to address issues and promote a positive culture.



High-performing, safe, and innovative service delivery

2.6. Operational excellence pillar

2.6.1. 2026/27 activity

The activities identified in our operational excellence pillar support Ubico in providing high quality, safe and compliant services, harnessing continuous improvement and innovation wherever possible.

In 2026/27, we will continue to enhance measures to demonstrate our progress against our strategic goals, develop sound business intelligence to be able to react and adapt to change, and use insights from our data to help evaluate quality and performance that we can use to strengthen the management of the business and inform future business decisions and strategy. To support this, our balanced scorecard will be embedded across the business to inform both operational and strategic assessments. We will also continue to develop our strategic cost projection plans, analysing each to inform future decision-making and project planning.

2026/27 will be our second year of delivery to a three-year internal audit plan. We will continue to seek accreditation to our existing ISO standards for our Health and Safety, and Environmental Management Systems, as well as beginning the process of extending our accreditation to include ISO accreditation for energy and quality management systems, and greenhouse gas reporting. Options for a health and safety platform or software will be evaluated to streamline health and safety processes. We will also begin the process of evidencing our high standards in driver and vehicle compliance through accreditation to the Driver and Vehicle Standards Agency (DVSA) Earned Recognition scheme.

A key area of work that we will undertake in 2026/27 will be the mobilisation and commencement of waste and recycling collection services for Wiltshire Council, and, once mobilised, a key focus in our Wiltshire services will be planning for scheme changes coming into effect in 2027, as well as planning for the introduction of kerbside films collections across all our recycling services from 2027.

The introduction of 'in-cab' technology across our waste, recycling, street cleaning and grounds maintenance services has been a key project in our digital transformation programme in recent years. Now in place across the company, work will continue to focus on benefits realisation, insight analysis and harmonising the operational approach to system use across the company, to drive efficiency. Implementation of in-cab technology in our new

Wiltshire services will be a key element of the mobilisation project ahead of service delivery commencement in July 2026. A strategy will also be developed to harness emerging technologies, artificial intelligence, and data analytics facilitate smarter decision-making, operational optimisation, and future readiness. This strategy will be subject to regular review to ensure it remains aligned with technological developments and organisational priorities. We will also undertake a review of our suite of performance dashboards to ensure an efficient and effective approach.

We are committed to fostering positive impacts on society and the environment and will continue to ensure that social responsibility is embedded into our policies, plans and business practices to the benefit our employees, the wider community, and the environment. We will continue to leverage procurement opportunities to gain social, economic and environmental benefits for the communities we serve, sourcing local goods and services wherever economical and practical. We will provide local employment opportunities with good employment standards and practices and will provide apprenticeship and training opportunities. We will support community initiatives, for example by collecting bagged waste after community litter picks and supporting our partners at community events when requested. We will also explore opportunities to support and expand community volunteer initiatives, working in partnership with our shareholder councils to develop clear frameworks for collaboration.

2.6.2. Procurement activity 2026/27

Planned 2026/27 procurement activity is outlined below:

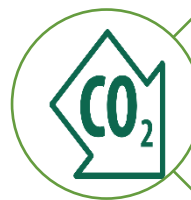
- Award contract extensions or undertake new procurement activity and award a contract for the supply of:
 - Fleet management system
 - Vehicle hire
 - Outsourced fleet maintenance – West Oxfordshire
 - Cleaning / janitorial and operational supplies
 - Weed control operations covering Cheltenham and Cotswold
 - Service and repair or refurbishment of waste/hooklift containers
 - PPE and uniform
 - Management of haulage and sales of recyclate, disposal of recycling products

- Undertake new procurement activity and award a contract for the supply of:
 - PPE, footwear and gloves

- Provision of vehicle parts
- Provision of fuel cards
- Provision of Connected Workforce Solution (in-cab, and separate arrangement for Wiltshire)
- Container management for Wiltshire
- Fleet maintenance provision for Wiltshire
- HR Benefits - Death in Service / Life Insurance & Health Cash Plan

2.6.3. Operational excellence – key risks and mitigations

Risk	Mitigation
Budget pressures.	Continue to seek early understanding of areas of cost pressure for partners and, with partners, consider mitigation plans where necessary. Continue to highlight potential areas of cost pressure as early as possible in both budget setting processes and monthly forecasting reports.
Delays or resistance in moving from paper-based to digital processes could result in inefficiencies, data loss, or lack of real-time insights.	Comprehensive training, engaging colleagues early in the process, and ensuring robust change management. Pilot new systems before full rollout where possible, monitor adoption closely, and review effectiveness on a regular basis.
Failure to develop or implement a clear strategy for emerging technologies could lead to missed opportunities, wasted investment, or security vulnerabilities.	Regularly review the strategy to adapt to technological advances and organisational needs, regularly assess our needs.
Capacity to deliver unplanned work.	Project management office manages inflow and monitors resource availability. Partner expectations managed where unplanned work is requested, and additional resource requested if required.



Reduced environmental impact and leadership in sustainability

2.7. Climate pillar

2.7.1. 2026/27 activity

Ubico's carbon strategy recognises two strands of activity:

- Ubico owned carbon reduction activities that are within the gift of the company to deliver.
- Shareholder sponsored activity which requires approval and funding from our shareholders.

We will continue to deliver our programme of activities to reduce our environmental impact across the business, evaluating the resources we need to deliver the outcomes of our climate pillar, and investing in relevant training for colleagues in key roles. To strengthen delivery of our climate commitments, we will appoint a dedicated climate lead responsible for coordinating our carbon reduction activities, supporting shareholder sponsored projects, and driving progress across our climate pillar. We will also explore options for any grants or funding which may be available to us to support delivery of climate projects and benefits and will evaluate the potential benefits of establishing a Ubico-led climate operations forum to facilitate shared climate discussions with all our partners simultaneously.

Another key project will centre around the impact from our use of resources within the buildings and depots that we occupy, building on the outcomes from a pilot scheme undertaken during 2025/26. The scheme has a focus on influencing attitudes and behaviours to reduce our energy consumption, save money and reduce our environmental impact.

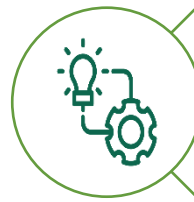
Work will continue with our significant suppliers to gather data on their scope 1 and 2 emissions, allowing us to gather more detailed data for scope 3 wherever possible, and we will continue to evaluate our opportunities for sourcing more environmentally friendly products in our supply chain, within our existing budget constraints. We will design a dashboard of relevant key performance Indicators for projects which have a significant climate impact and we will consider adopting a formal mechanism for the recording and reporting of our environmental, social and governance (ESG) performance.

Building on the successful introduction of a number of alternative fuelled vehicles (AFV's) and electric vehicles (EV's) with our partners, we will continue to advocate for and support the introduction of alternative fuel options, coupled with any associated change of infrastructure, where this is supported by our shareholders. We will also continue to maintain

our close working relationship with our partners and shareholders, supporting projects that increase biodiversity and reduce carbon emissions.

2.7.2. Climate – key risks and mitigations

Risk	Mitigation
<p>Resource to deliver climate specific activities. Innovation projects in fleet or depots may face technical, financial, or operational barriers, delaying climate benefits.</p>	<p>Appropriate teams within Ubico lead on different elements of our climate pillar delivery, and all teams support initiatives. Work closely with partners to assess feasibility, conduct cost-benefit analyses, and pilot innovations before wider rollout.</p>
<p>Ubico’s success in reducing its carbon emissions is intrinsically linked to partner decisions.</p>	<p>Climate opportunities which must be approached jointly are presented to partners for consideration. Ubico invited to attend key partner climate meetings.</p>
<p>Failure to deliver visible climate progress could damage Ubico’s reputation with shareholders and the public.</p>	<p>Celebrate successes, provide transparent progress reports, and engage stakeholders in climate initiatives.</p>
<p>Lack of robust social impact and climate KPI’s could lead to poor visibility of progress and missed opportunities for improvement.</p>	<p>Evaluate and adopt suitable measurement tools, develop a comprehensive KPI suite, and embed reporting into governance processes.</p>



2.8. Business development pillar

2.8.1. 2026/27 activity

Key focus areas in the business development pillar this year are around reviewing services delivered for each shareholder to identify opportunities for joint working and supporting planning for potential Local Government Reorganisation (LGR). Another key project is mobilising for the delivery of environmental services for Wiltshire from August 2026 and we will continue to engage shareholders on potential service enhancements and explore new offerings to keep pace with evolving needs. We will also consider and plan for the impacts of 'Simpler Recycling' regulations.

If enacted, Local Government Reorganisation (LGR) could significantly alter our shareholder structure in the next few years and offer opportunities to introduce greater consistency in service delivery and policy across new unitary authority areas. Ubico will work closely with our relevant partner councils to identify a roadmap for delivering any changes needed ahead of any new unitary arrangements coming into effect, as well as considering and planning for changes that may take place after that date. Where feasible, Ubico will also develop business cases and a roadmap for appropriate and agreed service consistency measures ahead of any formal LGR changes, to capture early benefits, streamline operations, and reduce disruption when new unitary arrangements are eventually enacted.

For the mobilisation and implementation of service delivery of environmental services for Wiltshire Council, we will deliver a carefully planned programme of work which will include the transfer of people and resources, deployment of vehicles and infrastructure, robust engagement with key stakeholders to ensure a smooth and effective transition, and the integration of a new shareholder into our governance structure. Once mobilised, work will begin to plan for changes to the services to be delivered in the 2027/28 year.

The new requirements of the 'Simpler Recycling' regulations will start to impact our partners' collection scheme designs from April 2027, with the addition of films collections required at the kerbside from that date, and food waste if not already collected. In 2026/27 we will begin planning for the addition of these services to kerbside collection schemes where necessary, working in close partnership with our shareholder councils.

We will undertake a review of the services we could provide to parish and town councils, assessing demand, feasibility, and alignment with our shareholder priorities. This will include

exploring opportunities to support local communities through tailored environmental services and identifying gaps where Ubico could add value.

We will also continue to support partner activities that safeguard future growth and improve operational efficiencies; continue to consider any approaches relating to growth which could create value for the partnership, using our shareholder approved outline business case fund to forward business cases in a timely manner for shareholder consideration, and design any growth projects which are approved.

2.8.2. Business development – key risks and mitigations

Risk	Mitigation
Expectation of delivery beyond that which can be achieved with available capacity.	Resource analysis undertaken for key current and potential future projects. Scenario planning in place to consider range of scenarios and how that might impact resource requirement.
Leadership capacity to manage an expanding portfolio.	Focus on core environmental services where we are skilled and experienced. Include additional, appropriate, leadership capacity in any business cases for growth.
Not responding to pending legislative changes could expose Ubico to compliance risks or require last-minute adjustments.	Sound project and resource planning, involve legal and compliance teams early, maintain open dialogue with shareholders.
Failure to anticipate or respond to LGR impacts could disrupt services or strategic projects.	Monitor LGR developments closely, engage with shareholders on potential impacts, and develop contingency plans for different scenarios.
Lack of alignment or appetite for cross-boundary projects could limit collaboration and growth.	Engage in open dialogue with shareholders, identify mutual benefits, remain flexible to adapt to changing circumstances.